PineSoft

Professional Training Database

Access 2010 / 2013 Edition

FinDonIT

Instruction Manual

Version 12.6c

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Structure

As a Microsoft Windows application which uses the Microsoft Access database users of any Windows application should have little difficulty in getting to grips with this PineSoft Application. This manual is divided into three main sections :

- **Getting Started** {pages 6 - 18} describes how to install the software and how to use the keyboard, mouse, application menus & toolbars etc.
- **Main Menu Options** {pages 19 - 46} describes the main modules of the application - see page 19 for a summary of the available options with important features and necessary procedures highlighted.
- **Miscellaneous Options** {pages 47 - 50}

Full Version {Single User, Network or Enterprise}

The full version is set up for use within a particular Department/Placement Unit of an Institution. Your university and department/school name appear as headers in reports to give a professional and customised quality of output. Users have full control over the number and titles of courses to be used. You may also create your own Customised Letters/Reports to give total flexibility. You will have to enter your own company and student records, so it is well worth using the demonstration version, which has been set up with dummy records, to get a quick idea of the operation of the software. The Network Version launched in 1996 gives authorised users full concurrent access to the application. The Enterprise Version launched in 2011 uses Microsoft SQL Server and facilitates the use of Web Access modules giving Students, Visiting Tutors and Placement Managers remote access to relevant data with the option to update information. The level of access is under the full control of the Placement Manager.

Demonstration Version

The demonstration version has the same structure as the full version and includes following dummy database files :

- Company records.
- Student records for the B.Sc. in Applicable Mathematics and Post-graduate Diploma in Information Technology courses.
- Job, application, placement, letter and memo samples.

You may add to or modify any of the above records, however, report output will include headings for the University of Abertay Dundee, School of Computing & Advanced Technologies.

The PineSoft Attachment Manager and Password Protection options have been disabled and the demonstration version is set to time out after a given period – please contact PineSoft to obtain a Current Version, if necessary.

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1 : Introduction

The PineSoft Professional Training Database is designed to meet the needs of course administrators who need to maintain details of external company contacts and keep track of the progress of students on their courses.

The PineSoft database launched in the spring of 1989 has an extensive user base in Universities and other Institutions throughout the UK. Since 1995 the application has used the Microsoft Access database engine. The XP Edition was launched in 2004 and version 12 based on Access 2007 released in 2008. Version 12.6 represents a major upgrade with the addition of significant new features. Single-User, Multi-user and the new Enterprise Version are available.

The preferred distribution medium is on a CD.

The Network Version of the application available since 1996 enables any authorised users to have concurrent access to the application. A single shared data file is loaded on a network drive, while PineSoft application files are installed on local PC's. This configuration helps to minimise network traffic and improve performance. Full details are included in the Network Version README file and the on-line help file.

Application requirements are :

- a PC with a minimum of 1GB RAM.
- Microsoft Windows 98, NT, 2000, XP, VISTA, 7 or 8
- Microsoft Office 2007 / 2010 / 2012 including Access, Word, Excel and Outlook
- Microsoft SQL Server for the Enterprise Version.
- a 1024 x 768 or higher screen resolution is required for the application. Use a 16 bit (64,000) minimum colour depth for smooth grey shaded displays of Main Database forms. Photographs in the demo were taken using a digital camera and then reduced in size and saved as jpg's, images are stored in a folder, outside the database, preventing any database bloat! It is not difficult to achieve photographic quality images - check the on-line help.
- any printer supported by Windows. **{**Avery L16 laser labels - 4" x 1&1/3" for label printing.}

1.1 Year 2000 Compliance

The PineSoft application is year 2000 compliant. The PineSoft Pop-Up Calendar, provided for all date fields, ensures that date fields are entered in the correct century. To avoid any confusion as to whether 98 refers to 1998, 2098 etc I would strongly recommend that via the Windows Control Panel - Regional Settings you use the short date format dd/MM/yyyy (if the choice isn't in the drop down list, simply add the extra "yy"). This will ensure that all dates are always shown with 4-digit years, as in the actual screen shots and sample output in this User Manual.

1.2 Ease of Use / Help Files

Users who are familiar with other windows applications should be quickly into their stride with the PineSoft software. Full support for printers is taken care of by windows and a mouse offers the best way of navigating the application, though keyboard support is also provided. Help is provided by the usual Windows Help files. Press the [F1] key to display PineSoft Context Sensitive Help or click on the help button in Toolbars - see section 4.3

1.3 Backup

You should ALWAYS maintain regular backups of your valuable data stored in the single file Pinedat.accdb in your PineSoft installation directory, which contains all your data. The data file is located in your chosen installation directory for the Single-User version, or your Network Share for the Network version. **If the data file is lost or becomes corrupted you would have to re-enter all your data! A nightmare scenario!**

2 : Installation

2.1 Installing Software on a Hard Disk

To install the software on a hard disk you require 120MB of free disk space and a PC with a minimum of 1 GB RAM.

The application is designed to use your copy of Microsoft Access 2007, Access 2010 or Access 2012. Additionally Microsoft SQL Server or MySQL is required for the Enterprise Version.

2.2 Demonstration Version

For the demonstration version the Access Runtime files and all PineSoft program & data files are copied, by default, to C:\PinesoftDemo_V12_6.

Use the Custom Setup Install Option to choose a different location, if required.

2.3 Full Version {Single User, Network or Enterprise}

For the full version {single user} all files are copied to the Users area in folder PinesoftNet.

Use the Custom Setup Install Option to choose a different location, if required.

NOTE : Please see the Installation Guide supplied with the Network and Enterprise Versions for details of how to install the application on a shared network drive.

2.4 Using the Installation Batch File

All PineSoft application files, User Manuals etc. are supplied on a CD.

Insert the CD to automatically launch the setup programme, or display the files in the root directory of the CD using My Computer or Windows Explorer and double-click on the setup.exe file to launch the PineSoft installation program.

2.5 Optimising the Application

The speed of the application depends on the speed of operation of the Microsoft Access database. Users using modern processors with a minimum of 1GB of RAM should find that the application runs swiftly. Increasing the amount of RAM and moving to a faster processor are the best ways of improving performance.

2.6 Printer Set-up

The application will print to the default printer as defined by your Windows set-up. You may change printer or printer options from within the PineSoft application and save printer defaults, orientation, margins etc. in PineSoft reports.

Use A4 paper in your laser printer, headed paper being used for standard letters and student references. **You must use Avery L16 laser labels (ref : L7162) - 4" x 1&1/3" for label printing** {2 columns of 8 labels per A4 sheet - no space between labels - ½" top & bottom margins}.

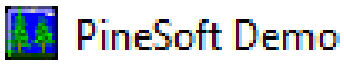
Note : The majority of PineSoft reports and letters are designed for A4 paper with Portrait orientation, while envelope settings are for DL envelopes with Landscape orientation.

While it is easy to use the Windows Printer Setup Options {see Section 4.3.3} to change the printer used for output the paper and orientation settings for the selected printer may replace the PineSoft defaults. This is particularly important in the case of envelope printing where you should ensure that you define Landscape orientation and DL paper for correct output. It is recommended that you Preview reports on screen to ensure valid output before printing.

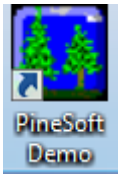
3 : Loading and Running the Application

If you are familiar with any Windows software package you should have no difficulty in using the PineSoft application immediately.

To load the application click on the PineSoft Windows option, shown below.



on the Start Menu or



on the Desktop (if present)

The PineSoft Main Menu shown on the next page is then displayed, preceded by an information screen in the demonstration version and a license/maintenance reminder message if within 60 days of the renewal date in the Full Version.

As you can see the Main Menu gives you easy access to the various PineSoft options. For convenience there are three groups.

The first “Examine/Edit Data” group gives direct access to the main PineSoft database tables.

The second group “Report/Mail Output” has over 100 different report & mail output options so that your data may be easily extracted and presented in paper form.

The final group contains the “Setup” and “Exit” buttons. The “Setup” button gives access to the extensive Setup options for customising prompts and lookup tables to suit individual requirements. The “Exit” button is used to close the PineSoft application.

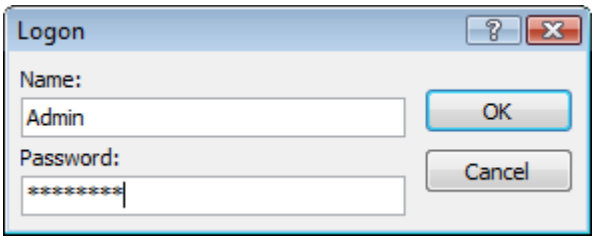
To select an option click on it with your mouse, tab to the required button and press [Enter], or type the underlined letter in the required button option.

3.1 Password Protection Option

The PineSoft application is not password protected by default. See Section 9.3 for details of how to assign or change a password.

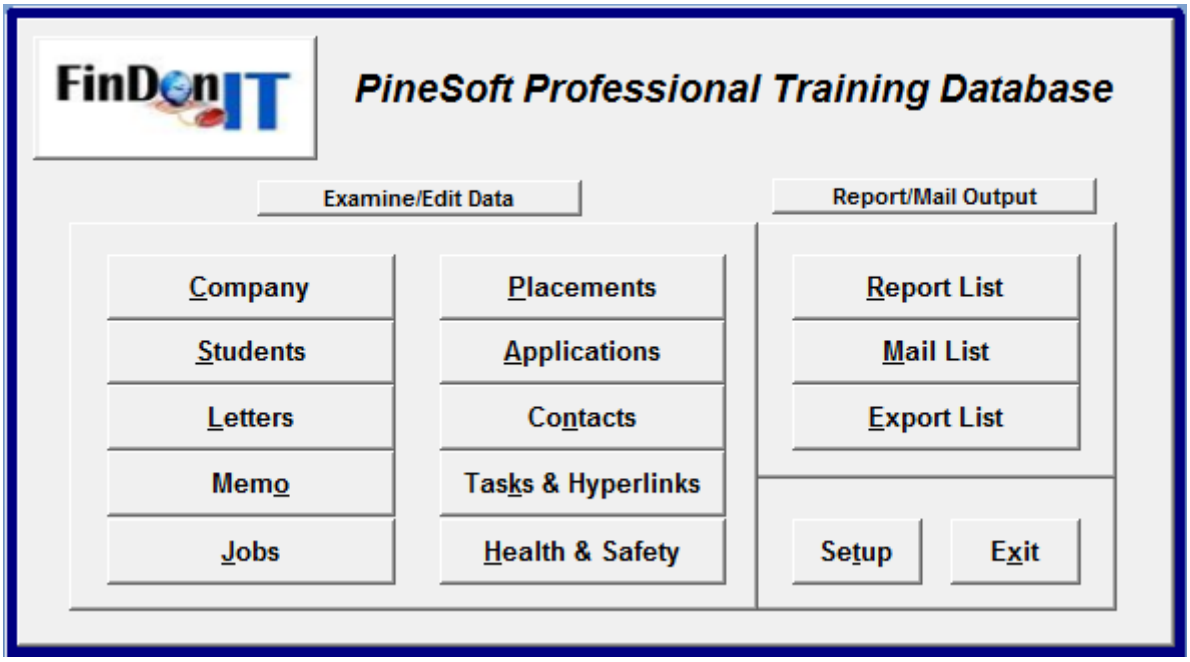
If a password is assigned then a logon screen, as shown below, is activated

NOTE : Any assigned password will apply to ALL Access 2007 / 2010 / 2012 database files, not just PineSoft.



The User name will always be Admin, and the password is user definable.

It is crucial that you remember the Logon name and password, or you won’t be able to open the application!



4 : Overview of Toolbar & Keyboard Options

Before discussing the various options available from the PineSoft Main Menu in detail we will first look at the commands available in the customised toolbars which form a central part of the application.

4.1 Using the Mouse and Keyboard

The use of a mouse is highly recommended as it makes interacting with menus, dialog boxes and selecting fields when editing records fast and simple.

When the manual directs you to click, position the pointer on the object you're to click and quickly press and release the left mouse button.

When the manual directs you to double-click, position the pointer on the object you're to double-click and in quick succession press and release the left mouse button twice.

When the manual directs you to drag the mouse, position the pointer on the object, press the left mouse button and hold it down - then move the pointer by dragging the mouse to highlight a region - then release the mouse button.

If you don't have a mouse, you may interact with the application solely with the keyboard.

4.2 Navigation, New Record & Filter

To Navigate between records, enter a new record or Toggle any applied filter use the toolbar at the bottom left of the display Window.

4.3 Help

To obtain PineSoft context sensitive help, press the [F1] key or click on the help button displayed on the extreme right of all toolbars.

If you are not familiar with the use of a Windows help file you will find extensive on-line help available in "How to Use Help" in the Help Menu, once the help file is activated.

4.3 Interacting with Toolbars

The application uses customised toolbars which duplicate the actions in the pull-down menus. In Access 2007/2010/2012 click the Add-Ins tab to display the above toolbar – by default the Ribbon is minimised and you may activate it when required.

The "Edit toolbar" shown above has the most buttons and is available when using an Examine/Edit option and using a mouse provides one click selection of common edit features. Text describing each toolbar button is displayed when you place your mouse pointer over it. Some buttons are displayed together in natural groupings and you will soon remember their functions which are summarised below and explained in more detail on the next few pages.

NOTE : Many toolbar options may be accessed more quickly by right clicking your mouse!

Close the current window & return to the previous one

View data via form {1 record per page} or datasheet {26+ per page}

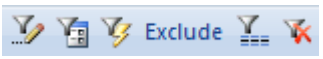
Print, Preview & Printer Setup

Check spelling in selected text

Cut, Copy, Paste

Find, Find Next, Replace

Sort on current field, ascending or descending



Filter options

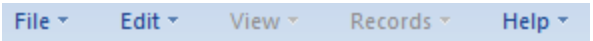
Move to the end of the records to Insert a New one

Undo changes to current field/record, Undo last command

Output & view current records in Excel – Excel is launched automatically

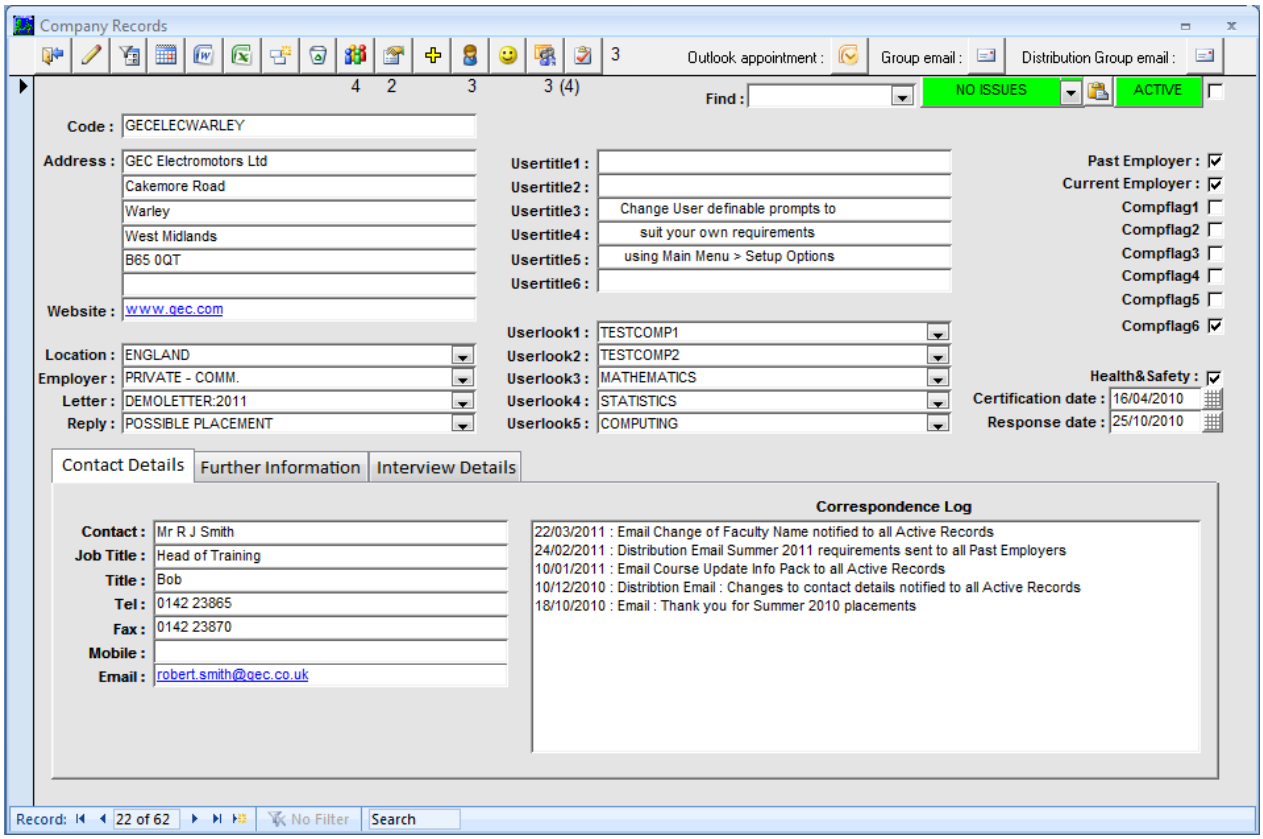
Display the PineSoft Windows Help file

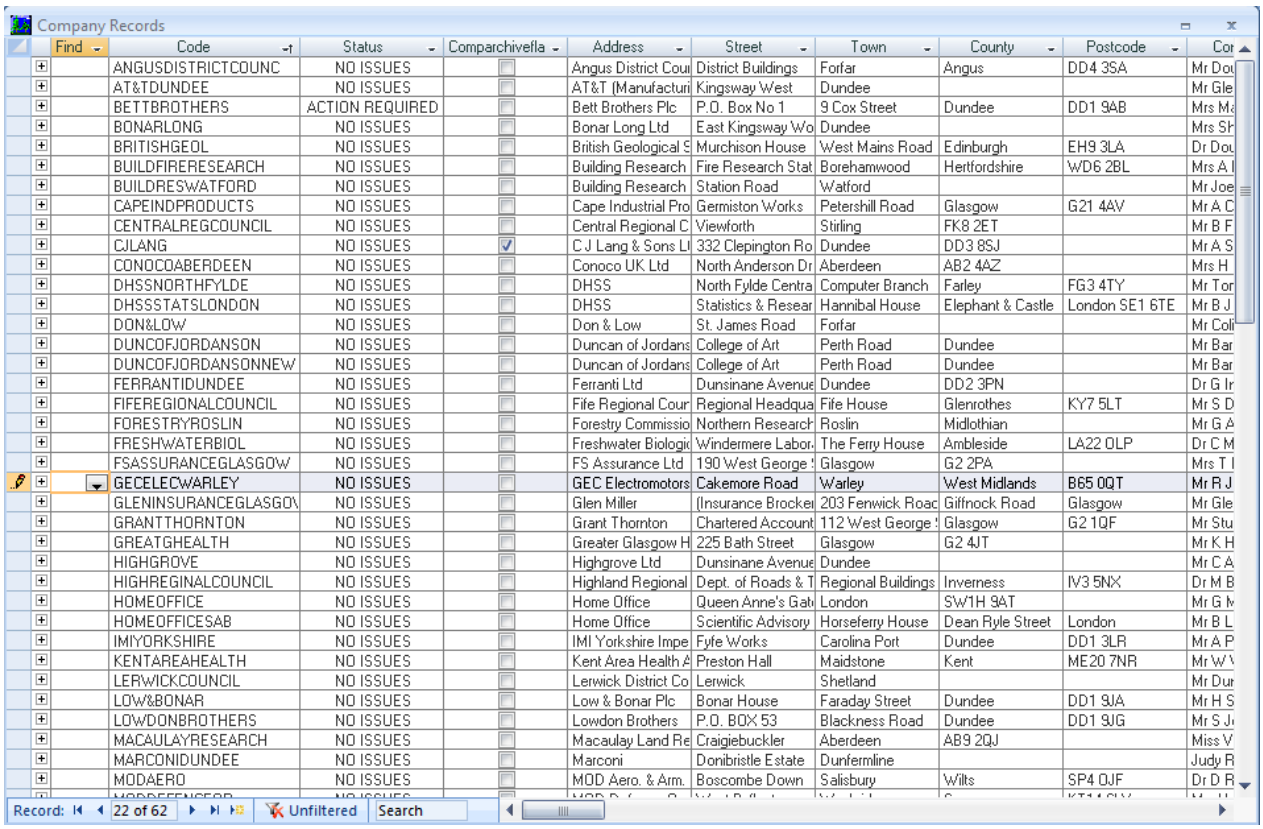
4.3.1 Note for Keyboard Users



Many toolbar options are also available via the menu bar as shown above, which is displayed in the Ribbon on the Add-Ins tab. To activate the menu via the keyboard first press the [ALT] key. For full details see Section 4.5 "Summary of Keyboard Techniques"

4.3.2 Illustration of Form & Datasheet Views




Company Records
Find
Code
Status
Comparchivefla
Address
Street
Town
County
Postcode
ANGUSDISTRICTCOUNC NO ISSUES Angus District Cou District Buildings Forfar Angus DD4 3SA
AT&TDUNDEE NO ISSUES AT&T (Manufactur Kingsway West Dundee
BETTBROTHERS ACTION REQUIRED Bett Brothers Plc P.O. Box No 1 9 Cox Street Dundee DD1 9AB
BONARLONG NO ISSUES Bonar Long Ltd East Kingsway Wo Dundee
BRITISHGEOL NO ISSUES British Geological S Murchison House West Mains Road Edinburgh EH9 3LA
BUILDFIRERESEARCH NO ISSUES Building Research Fire Research Stat Borehamwood Hertfordshire WD6 2BL
BUILDRESWATFORD NO ISSUES Building Research Station Road Watford
CAPEINDPRODUCTS NO ISSUES Cape Industrial Pro Germiston Works Petershill Road Glasgow G21 4AV
CENTRALREGCOUNCIL NO ISSUES Central Regional C Viewforth Stirling FK8 2ET
CJLANG NO ISSUES C J Lang & Sons Lt 332 Clepington Ro Dundee DD3 8SJ
CONOCOABERDEEN NO ISSUES Conoco UK Ltd North Anderson Dr Aberdeen AB2 4AZ
DHSSNORTHFYLDE NO ISSUES DHSS North Fylde Centra Computer Branch Farley FG3 4TY
DHSSSTATSLONDON NO ISSUES DHSS Statistics & Resear Hannibal House Elephant & Castle London SE1 6TE
DON&LOW NO ISSUES Don & Low St. James Road Forfar
DUNCOFJORDANSON NO ISSUES Duncan of Jordans College of Art Perth Road Dundee
DUNCOFJORDANSONNEW NO ISSUES Duncan of Jordans College of Art Perth Road Dundee
FERRANTIDUNDEE NO ISSUES Ferranti Ltd Dunsinane Avenue Dundee DD2 3PN
FIFEREGIONALCOUNCIL NO ISSUES Fife Regional Cour Regional Headqua Fife House Glenrothes KY7 5LT
FORESTRYROSLIN NO ISSUES Forestry Commissio Northern Research Roslin Midlothian
FRESHWATERBIOL NO ISSUES Freshwater Biologic Windermere Labor The Ferry House Ambleside LA22 0LP
FSASSURANCEGLASGOW NO ISSUES FS Assurance Ltd 190 West George S Glasgow G2 2PA
GECELECWARLEY NO ISSUES GEC Electromotors Cakemore Road Warley West Midlands B65 0QT
GLENINSURANCEGLASGO\ NO ISSUES Glen Miller (Insurance Brokei 203 Fenwick Roac Giffnock Road Glasgow
GRANTTHORNTON NO ISSUES Grant Thornton Chartered Account 112 West George S Glasgow G2 1QF
GREATGHEALTH NO ISSUES Greater Glasgow H 225 Bath Street Glasgow G2 4JT
HIGHGROVE NO ISSUES Highgrove Ltd Dunsinane Avenue Dundee
HIGHREGINALCOUNCIL NO ISSUES Highland Regional Dept. of Roads & T Regional Buildings Inverness IV3 5NX
HOMEOFFICE NO ISSUES Home Office Queen Anne's Gat London SW1H 9AT
HOMEOFFICESAB NO ISSUES Home Office Scientific Advisory Horseferry House Dean Ryle Street London
IMIYORKSHIRE NO ISSUES IMI Yorkshire Impe Fyfe Works Carolina Port Dundee DD1 3LR
KENTAREAHEALTH NO ISSUES Kent Area Health A Preston Hall Maidstone Kent ME20 7NR
LERWICKCOUNCIL NO ISSUES Lerwick District Co Lerwick Shetland
LOW&BONAR NO ISSUES Low & Bonar Plc Bonar House Faraday Street Dundee DD1 9JA
LOWDONBROTHERS NO ISSUES Lowdon Brothers P.O. BOX 53 Blackness Road Dundee DD1 9JG
MACAULAYRESEARCH NO ISSUES Macaulay Land Re Craigiebuckler Aberdeen AB9 2QJ
MARCONIDUNDEE NO ISSUES Marconi Donibristle Estate Dunfermline
MODAERO NO ISSUES MOD Aero. & Arm. Boscombe Down Salisbury Wilts SP4 0JF
Record: 22 of 62
Unfiltered
Search

4.3.3 Print, Preview & Printer Setup

In addition to the comprehensive Report & Mail Output options within the PineSoft application, it is also possible to preview or print records in form or datasheet views. The three buttons, from the left are Print, Preview & Printer Setup.

You may use the Preview button first to display the results on screen from which you can either cancel or print the display. In preview mode if you position your mouse pointer over the page it turns into a magnifying glass - clicking your mouse you may toggle between Zoom-in and Zoom-out.

The Print button will print the selected records directly to the Windows default printer.

The Printer Setup button opens a familiar Windows Setup Printer Dialog, where you may change the default printer, orientation - portrait or landscape, set margins etc.

NOTES :

(1) If you have filtered your data to obtain a subset of records then the print ALL option will apply to the current subset.

(2) The above features are useful for printing a list of look-up fields defined in the Main Menu Setup options. For example, Examine/Edit location codes - select the Print button to get a hard copy of your location codes.

4.3.4 Cut, Copy and Paste

The three buttons for Cut, Copy and Paste are standard across all Windows applications and enable you to easily move text within the application or to any other Windows application via the Windows Clipboard. See your Microsoft Windows documentation for full details. As usual, before you can cut or copy text or records you must mark them. Select text in a field by clicking where you want to start selecting and drag across the data. Alternatively hold down the [Shift] key and use cursors.

To select a record, click the “record selector” to the left of the record. To de-select click on any field in the record. The record GECELECWARLEY is selected in the illustration of Form & Database views on the previous page. {In datasheet view you may drag to select multiple records.}

NOTES :

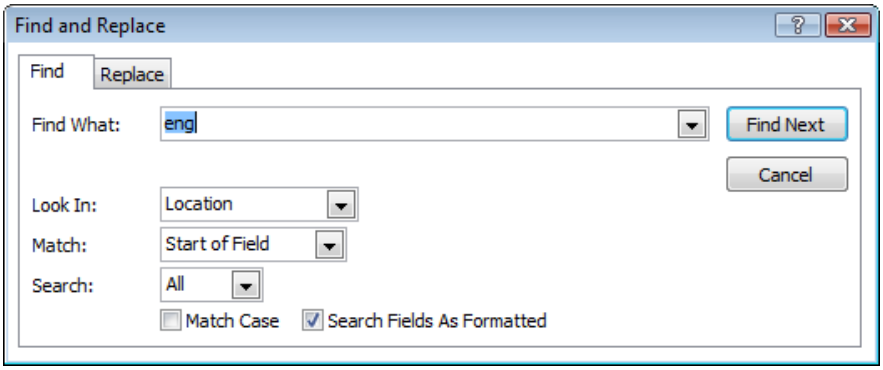
Once text or a record(s) is selected you may use the Cut button to remove it or the Copy button to copy it to the Clipboard. {Pressing the [del] key you may delete the text/record}. Any text in the Clipboard may be pasted at the flashing text insertion point by using the Paste button.

To copy records it is preferable to use the PineSoft Copy button, described in section 4.4 which automates the task.

4.3.5 Finding Data

The Find Dialog box shown below gives considerable flexibility when searching a database to locate specific records. The default search is applied to the current field which is faster than searching all fields.

To open the Find Dialog box, click on the left binocular button or press [F7] to display :



With the cursor in the location field the above settings may be used to find the first record with location field starting “eng” {such as ENGLAND} by clicking on the Find First button. To find subsequent matching records click on the Find Next button.

Note : after closing the Find Dialog box you can always find the next occurrence of the value most recently selected by clicking on the Find Next Toolbar button {the one in the middle} or by pressing [Shift][F4].

The above settings search for “eng” at the Start of Field. You may also search in Any Part of Field or Match Whole Field. Additionally you may use wildcard characters in the Find What box, using ? for a single character, * for any number of characters and # for a single number. You may use characters in square brackets to find one of several characters, for example [DMP] to find D or M or P, [C-G] to find any letter between C and G. You may specify characters you don’t want to find by including an exclamation mark after the first bracket, for example [!AFG] to find any character except A, F or G. Examples :

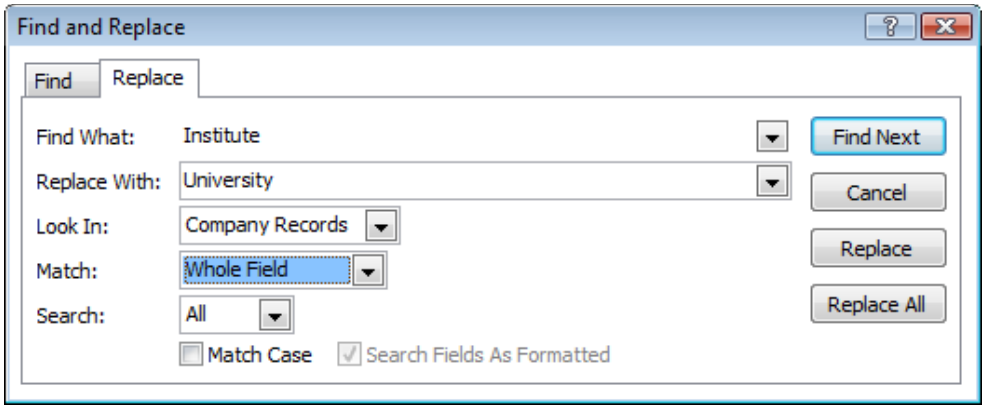
Search String	**Text Found**
Sm?th	Smith, Smyth etc.
L*ng	Lang, Lingering etc.
#th	5th, 8th etc.
*th	128th, 4th etc.
Paul[ao]	Paula, Paulo etc.
Paul[!ao]	Pauli {but not Paula or Paulo}

Note : to find one of the wildcard characters enclose it in square brackets. For example, use [#]1 to find the value #1.

4.3.6 Replacing Data

The Replace Dialog box shown below is similar to the Find Dialog box and enables you to find occurrences of specific text and replace it with different text.

To open the Replace Dialog box, click on the third binocular button or press [Shift][F7] to display :



With the above settings you may click on Find Next to find the first occurrence of “Institute” in any field - to change the text from “Institute” to “University” click on Replace or to leave the selected text as it is and find the next occurrence instead, choose the Find Next button again. {Choose Replace All to replace ALL occurrences without prompting}. When you have finished, choose the Close button to close the dialog box.

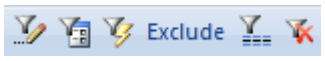
Note : if the dialog box obscures the text you can move it out of the way by holding your left mouse button down on the blue title bar and dragging the dialog box. Using a keyboard press [Alt][Spacebar] to display the Control Menu for the dialog box and use the Move option. As with the Find Dialog box you may use wildcard characters in the Find What text box.

4.3.7 Sorting Records

You may sort records in a table or form in a different order than they are usually displayed. For example, the default sort order for Company Records is Ascending {A - Z} based on the unique company Code field. To sort records ordered by location, position the cursor in the location field, then click on one of the two Quick Sort buttons to display in ascending or descending order.

Note : in datasheet form you may sort by more than one adjacent field. To do this mark the required columns by drag & clicking on the field names - then use the Quick Sort buttons.

For more flexibility, when sorting on more than one field, where you may require some fields sorted in ascending order and others in descending order see the next section on Filtering Records.



4.3.8 Filtering Records

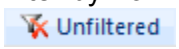
From the left the Filter buttons are “Advanced Filter/Sort”, “Filter by Form”, “Filter by Selection”, “Filter Excluding Selection”, “Apply Filter/Sort”, “Remove Filter/Sort - Show All Records” and “PineSoft Filter by Form” .

The Filter options give you unlimited flexibility to display subsets of records and/or sort records using criteria defined over several fields.

Use a filter when you want to :

- temporarily filter out records that don’t apply to your current task - for example, to display records from one of five different courses.
- find records that meet complex criteria, defined over more than one field.
- display records of students still requiring a current placement.
- sort records based on the contents of several fields when you want some fields sorted in ascending order and others in descending order. The sort is applied from left to right in columns.

Most users will use the “PineSoft Filter by Form” button and the “Cancel Filter” button (toggle between

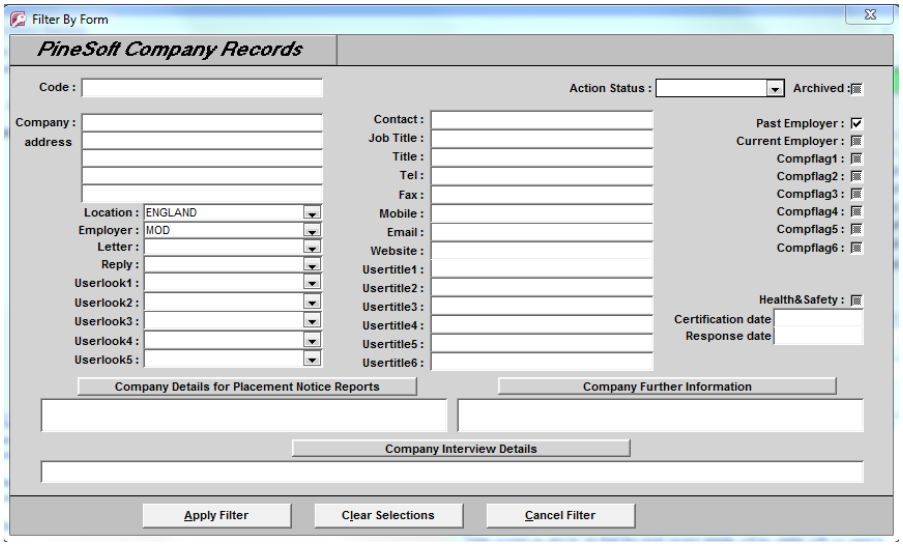
and 

- bottom left of screen) to easily filter required records, or restore All records as required.

Example Using the PineSoft Filter by Form Option

Click on the PineSoft “Filter by Form” button in the header of the Company Examine/Edit form to display the corresponding Filter by Form window shown below. With the shown selections clicking on the “Apply Filter” button would select MOD companies in England which have employed students in the past. Use the “Clear Selections” button to clear all current selections. For text fields entering don would match Donald, Donaldson etc. as a “*” wildcard

character is automatically appended to entered text. To match Stuart Donald you could enter "*don", where "*" stands for any number of characters.



As a further illustration suppose that you have created letters over a number of years using the Examine/Edit Letters option. To filter just the 2000 letters click on the "Filter by Form" button and enter *2000 in the letter date field. Click on the "Apply Filter" button to select year 2000 letters with dates such as 17 April 2000, etc. As you can see the "Filter by Form" option, introduced in PineSoft 2000, is very easy to use and represents a significant step forward. Users who require even greater flexibility may use the "Advanced Edit Filter/Sort" window as described in Example 2 below.

NOTE : You can always view any filter created using the "PineSoft Filter by Form" option in the "Advanced Edit Filter/Sort" window. Most users will probably find little need to delve into the more advanced search criteria available in Access 2007/2010. Right-click at the top of an Examine/Edit form and uncheck "Minimize the Ribbon" to use these options.

4.3.9 Adding a New Record

Clicking on the Add Record button shown above moves you to the end of the records and displays an empty record where you may enter new records.

NOTES :

(1) New records are added at the end of database tables - they are automatically sorted into the default database sort order when you close the database - so the next time you open the database the records will have been sorted.

(2) To ensure the integrity of your data you will not be able to save a record unless any key fields have unique values and in the case of the Student Database if any of the "required" fields have not been entered. Press the [Esc] key to abort an operation or use the Undo button options described below.

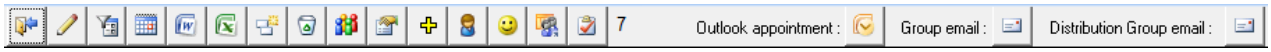
4.3.10 Excel

Output & view current records in Excel - Excel is launched automatically.

4.3.11 Undo buttons

The first Undo button is used to undo changes to the current field/record. Equivalent to pressing the [Esc] key. The second Undo button undoes the last command.

4.4 Interacting with PineSoft Buttons in Form Headers



The PineSoft buttons shown above are displayed, where appropriate, in form headers when Examining or Editing database records. To select a button option with a mouse simply click on it. To use the keyboard press the [F6] key to toggle to the header buttons - TAB to the button required then press [Enter]. When highlighted a description of the option is displayed in the status bar at the bottom of the screen. To display the description with a mouse hold down the right mouse button. A description of the available buttons is given below.

Close Form

Enable Edit / Read-Only Mode. You may use the Setup - “Display Default” options to set the Main Database forms to Edit Mode, or Read-Only mode initially.
You may toggle between the two modes by pressing the displayed button. Setup database tables are always set initially to Read-Only, so you will always need to click the Enable Edit mode button to make changes.

Filter by Form option. The easiest way to filter records.

Pop-up Calendar. You may minimise the calendar, if required, and keep it available at all times during a PineSoft session.

Export the present set of records to a file in Microsoft Word Mail Merge format. {Text .txt format used}

Export the present set of records to a Microsoft Excel file.

Copy the current main database record. {After copying a "*" character is appended to the copied key code to make it unique, otherwise it can't be saved.}

Delete the current main database record & related records. Requires confirmation for safety.

Display pop-up form of additional company contacts for the current company record.

Display pop-up form listing Student Applications for the current record.

Display pop-up form to Add New Placement Record(s).

Display pop-up form listing Student Placement Details for the current record.

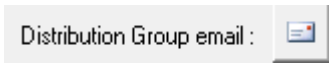
Display student pop-up form, available while browsing the Main Company Form.

Display pop-up Jobs Form, available when browsing Company records. Use to enter new jobs.

Display pop-up Tasks Form, available in Company, Student, Placement and Jobs forms. All include a hyperlink option to link to external files. Use to keep track of User-defined tasks for company, student or placement records. Monitor company consultancies, the return of student reports, projects etc.

This option requires that Microsoft Outlook is open and creates appointments, where you may set reminders and create scheduled meetings etc. You may use this feature which is part of Office 2007/2010/2012 - you don't necessarily need to be using Outlook as your Email Client.

The Group Email button opens the default Email Client and includes company emails from the currently filtered group of companies - use the PineSoft Filter by Form button to easily filter records. You have the option to automatically record details in the Correspondence Log field.



The Distribution Group Email button opens the default Email Client and includes Email addresses from the Contacts Pop-up (distribution flag ON) list - again the currently filtered group of companies is used as the record set - use the PineSoft Filter by Form button to easily filter records. You have the option to automatically record details in the Correspondence Log.

NOTE : The Export buttons included in Form Headers are designed to give users as much flexibility as possible, however, it is unlikely that they will be required in day to day use. If you want to export data to create Customised Letters or Reports it is best to use the powerful Export Options included in the Main Menu Export List - see Section 8.2.8 of the User Manual for further details.

4.5 Summary of Keyboard Techniques

4.5.1 Keyboard : Navigation Techniques

[TAB]	Move to the next field
[Shift][TAB]	Move to the previous field
[Ctrl][PgDn]	Move to the next record
[Ctrl][PgUp]	Move to the previous record
[Ctrl][Home]	Move to the first record
[Ctrl][End]	Move to the last record
[PgUp]	Scroll up one page
[PgDn]	Scroll down one page
[F6]	Toggle between main form & header region
[Alt][Shift][F6]	Move between pop-up windows and main form
[Alt]	Activate the menu bar

4.5.2 Keyboard : Editing Techniques

[F2]	Toggle selection of current field. When selected {highlighted} new text replaces old. Insertion occurs at blinking insertion point.
Arrow Keys	Move insertion point within a field

[Esc]	Undo changes to the current field or record
[F4] or [Alt][🡻]	Open find list / option list to display choices
[Shift][F2]	View & edit the current field in the Zoom(enlarged) dialog box
[Alt][Spacebar]	Display the control menu {use to close pop-up windows}

Useful Commands for Network Version

[Shift][Enter]	Save the current record
[F9]	Refresh data in currently active window
[Shift][F9]	Requery records to show any new records

4.5.3 Keyboard : Search Techniques

[F7]	Display the find dialog box
[Shift][F4]	To find the next occurrence of the value defined in the find dialog
[Shift][F7]	Display the replace dialog box

4.5.4 Print Preview Keys

[P]	Display the Print dialog box
[S]	Display the Printer Setup dialog box
[Z]	Toggle Zoom in/out for a magnified view of a page
[Esc]	Cancel Print Preview / Print dialog / Printer Setup dialog Cursors to move around page
[F5]	Move to Page Number box - type in required page & press [Enter]

4.6 Drop-down Lists

The Find drop-down lists used to locate specific records and access look-up tables, as illustrated below,

may be used with mouse or keyboard.

- With a mouse click on the arrow on the right of the list box to display the drop-down list. Double-click an entry to select it.
- With the keyboard, press [F4] to open the drop-down list then 🡻, 🡹, [PgDn] etc. to highlight your choice, then press [Enter] to select it.
- Using incremental type-in. Press the first letter of your choice. If more than one item in the list starts with that letter, you are taken to the first one. Press the second letter of your choice to narrow the selection, followed by subsequent letters if necessary. This feature is particularly useful with very large pick lists. Once your chosen item is highlighted press [Enter] to select it. To back out of incremental type-in one step at a time successively press [BackSpace] to delete characters.
- Note : when selecting records at random using the “Select Lists” used in Report/Mail output incremental type-in is confined to the first character only {see section 8}.

NOTE :
The Find drop-down list has one limitation. It can’t cope with Irish surnames, such as O’Conner due to the apostrophe. The solution is to omit the apostrophe in the code and use OCONNER – the actual student name can still be entered correctly as O’Conner.

Summary of Main Menu Groups

The Main Options within the PineSoft application have been divided into three groups as shown in the screen display in section 3 of this manual. Important tasks are discussed in Sections 5 – 8.

Setup Submenu Options : Section 5

The Setup Submenu options which are used to modify {as required} the default database "look-up" tables for company & student codes, staff names and user definable prompts. Only values defined via the setup options may be entered into the corresponding fields of the main database tables. It is recommended that a single "Placement Manager" is responsible for changing or adding new course titles.

At the start of a new session you should use the "New Session options" to update student and company fields, before entering details of new student cohorts. See Section 5 for details.

New Session Options : Section 6

At the start of a new session you need to carry out a number of essential tasks before starting to enter student or placement details for the new session. See the Setup Submenu - New Session Options.

Examine/Edit Data : Section 7

Use the Examine/Edit Company option to insert new company records or to update or correct details in existing records. Records are kept in alphabetical order via the company code field and you should use informative codes such as GECELECWARLEY, not short cryptic ones.

Use the Examine/Edit Student options to insert new student records or to update or correct details in existing records. Records are kept in alphabetical order via the student code field and you should use informative codes such as DONALD_LOUISE, not short cryptic ones. For the correct operation of Mail & Report options it is essential that you complete the entries for the surname,fname, mailname, title, year, placement number, session and course fields. You have to supply entries for these fields or it will not be possible to save the record so it is not possible to have invalid data.

Use the Examine/Edit Letters option to create an unlimited number of letters Use the Examine/Edit Memo option to create an unlimited number of memos.

The Jobs option is used to enter or amend details of Job Vacancies

The Placements option is used to browse historical placement records and to Edit or Amend placement records.

The Applications, Contacts and Tasks & Hyperlinks options give direct access to the relevant database tables, if required, though you will normally access these tables via the Pop-up forms in the Main Company or Students database forms. The Pop-up forms automatically display the relevant details for the selected company or student.

The Health & Safety option lists all relevant Health & Safety requirements for placed students.

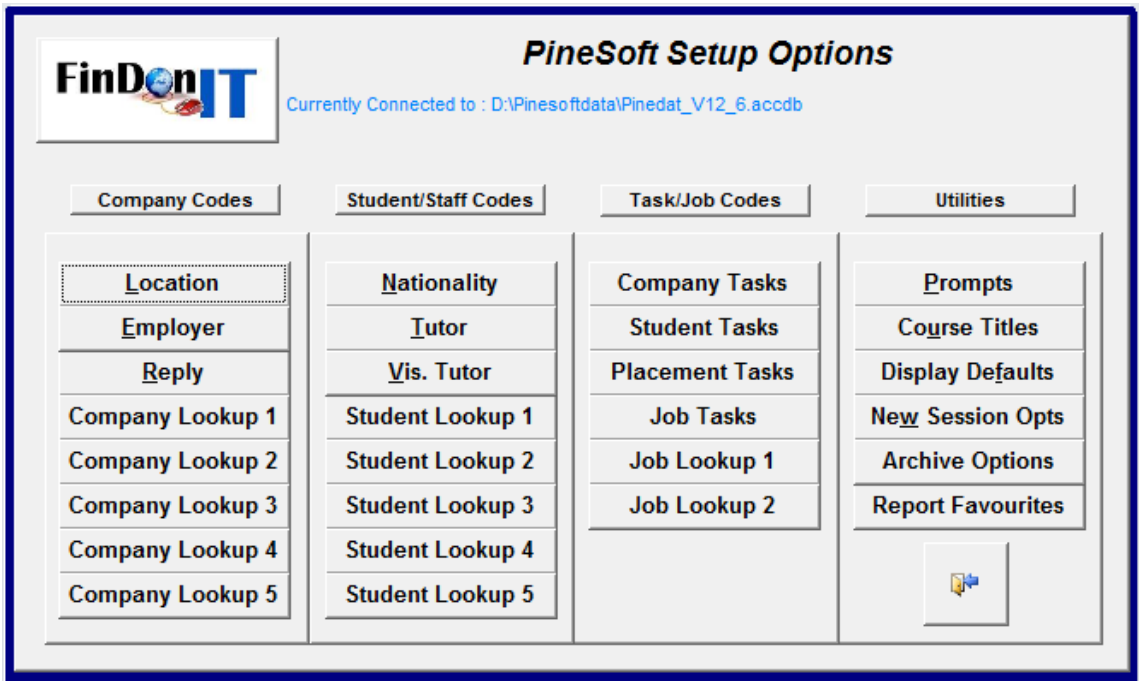
Report/Mail Output : Section 8

Use these options to select from over 120 report & mail options which organise and present your data in a wide range of useful formats. See the appendices for some sample output.

5 : Setup Submenu Options

5.1 Overview

The Setup Submenu displayed below may be used to modify {as required} the default database "look-up" tables for company & student codes, staff names, task/job codes, user definable prompts etc.

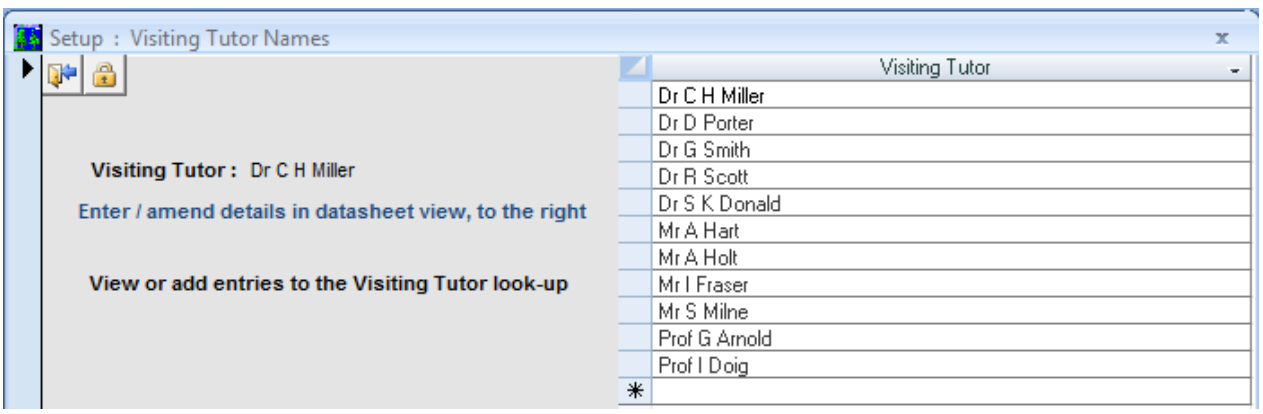


There are two main advantages in having user-defined options :

- You are not constrained by default values and have the flexibility to customise the application to match your requirements.
- The values, which you define, form "look-up" tables and to ensure the integrity of your data only values included in these tables may be entered into the main company or student databases.

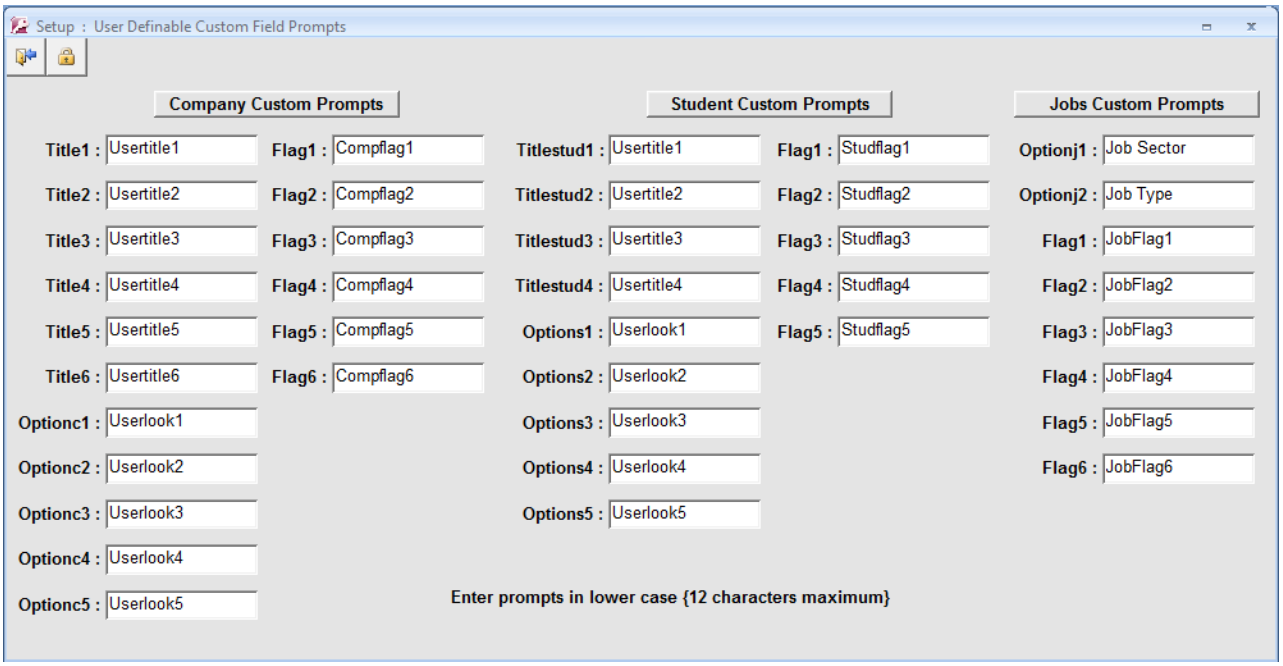
The "look-up" tables defined for geographical location, type of employer, reply codes, etc. are entered in the main databases via drop-down lists which display all defined values.

Illustration of Visiting Tutor Setup Form

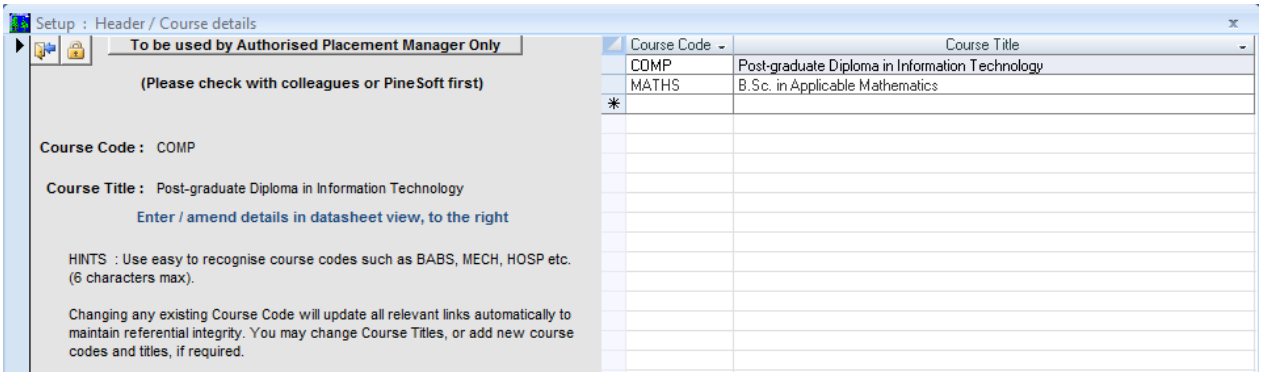

Setup : Visiting Tutor Names
Visiting Tutor
Dr C H Miller
Dr D Porter
Dr G Smith
Dr R Scott
Dr S K Donald
Mr A Hart
Mr A Holt
Mr I Fraser
Mr S Milne
Prof G Arnold
Prof I Doig
Visiting Tutor : Dr C H Miller
Enter / amend details in datasheet view, to the right
View or add entries to the Visiting Tutor look-up

Note : all Setup Forms are locked so you need to click on the icon before editing any entries. Click the print button to get a hardcopy of the datasheet view of records.

Using the **Prompts option**, as shown below, you may define seventeen company, fourteen student and eight job field names of your choice to cope with individual preferences. The User-definable toggle fields are particularly useful when filtering records. Customisable prompt fields in the company, student and jobs databases also have user definable look-up tables for further flexibility.



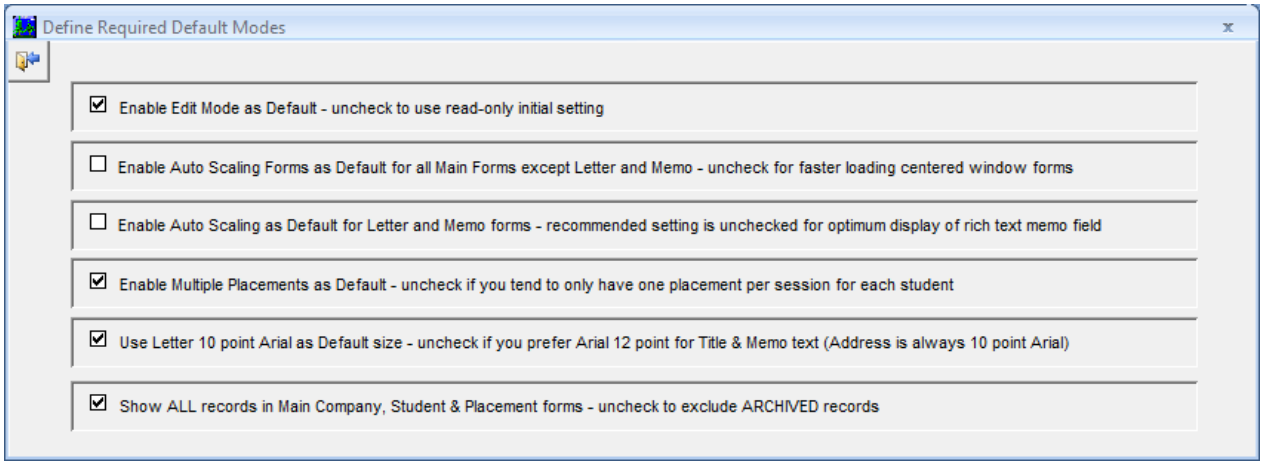
Use the **Course Titles option** to edit existing course titles or to enter new course codes and titles.


Setup : Header / Course details
To be used by Authorised Placement Manager Only
(Please check with colleagues or PineSoft first)
Course Code : COMP
Course Title : Post-graduate Diploma in Information Technology
Enter / amend details in datasheet view, to the right
HINTS : Use easy to recognise course codes such as BABS, MECH, HOSP etc. (6 characters max).
Changing any existing Course Code will update all relevant links automatically to maintain referential integrity. You may change Course Titles, or add new course codes and titles, if required.
Course Code
Course Title
COMP
Post-graduate Diploma in Information Technology
MATHS
B.Sc. in Applicable Mathematics

Changing "Prompts" or "Course Titles" should be the responsibility of a single Placement Manager!

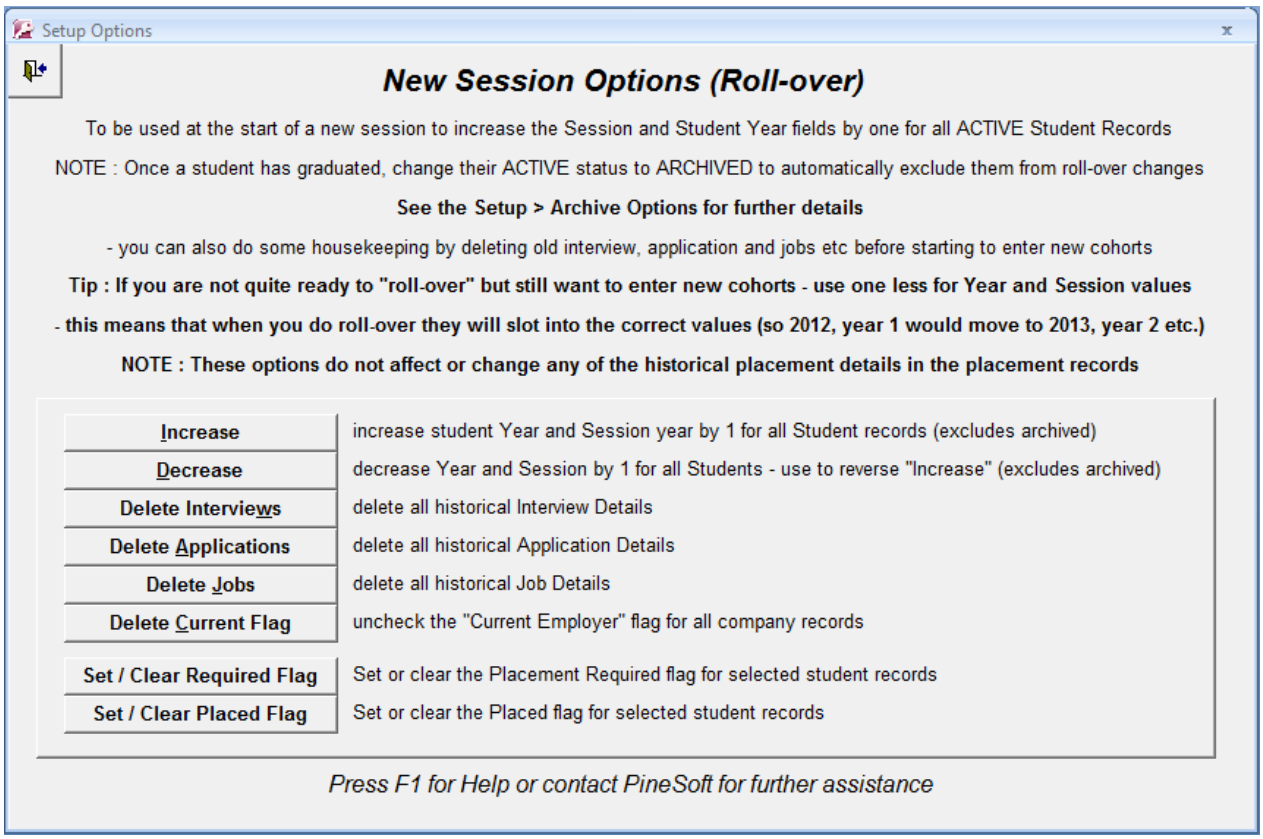
Use the **Display Defaults option** to set preferences to suit your requirements. Users may set the initial default for Main Database forms to Edit or Read-Only. The display of Main Database Windows may also be set to "Centred" or "Auto-scaling" etc.

The recommended settings, supplied with your font-end database file are shown below :


Define Required Default Modes
Enable Edit Mode as Default - uncheck to use read-only initial setting
Enable Auto Scaling Forms as Default for all Main Forms except Letter and Memo - uncheck for faster loading centered window forms
Enable Auto Scaling as Default for Letter and Memo forms - recommended setting is unchecked for optimum display of rich text memo field
Enable Multiple Placements as Default - uncheck if you tend to only have one placement per session for each student
Use Letter 10 point Arial as Default size - uncheck if you prefer Arial 12 point for Title & Memo text (Address is always 10 point Arial)
Show ALL records in Main Company, Student & Placement forms - uncheck to exclude ARCHIVED records

6 Setup Submenu : New Session Options (Roll-over)

Use the **New Session Options submenu** to "Increase", "Decrease", "Delete Interviews", "Delete Applications" and "Delete Jobs". These options are used at the start of a New Placement Session to update records before entering details of new student cohorts.


Setup Options
New Session Options (Roll-over)
To be used at the start of a new session to increase the Session and Student Year fields by one for all ACTIVE Student Records
NOTE : Once a student has graduated, change their ACTIVE status to ARCHIVED to automatically exclude them from roll-over changes
See the Setup > Archive Options for further details
- you can also do some housekeeping by deleting old interview, application and jobs etc before starting to enter new cohorts
Tip : If you are not quite ready to "roll-over" but still want to enter new cohorts - use one less for Year and Session values
- this means that when you do roll-over they will slot into the correct values (so 2012, year 1 would move to 2013, year 2 etc.)
NOTE : These options do not affect or change any of the historical placement details in the placement records
Increase
increase student Year and Session year by 1 for all Student records (excludes archived)
Decrease
decrease Year and Session by 1 for all Students - use to reverse "Increase" (excludes archived)
Delete Interviews
delete all historical Interview Details
Delete Applications
delete all historical Application Details
Delete Jobs
delete all historical Job Details
Delete Current Flag
uncheck the "Current Employer" flag for all company records
Set / Clear Required Flag
Set or clear the Placement Required flag for selected student records
Set / Clear Placed Flag
Set or clear the Placed flag for selected student records
Press F1 for Help or contact PineSoft for further assistance

The **Setup > Archive options** may be used along with the New Session options to automate the archiving of students who have graduated.

The **Setup > Report Favourites** options facilitate the selection of favourite reports.

The Exit button takes you back to the Previous Menu.

6.1 List of Start of New Session Tasks

At the start of a new session you need to carry out the following essential tasks before starting to enter student or placement details for the new session.

1) make a historical backup of the file Pinedat_V12_6.accdb in your PineSoft data directory (or Network drive). Keep this in a safe place in case you need to restore the information at some future date.
2) For students who have graduated change the ACTIVE display to ARCHIVED - this will ensure that their Session and Year values remain unchanged when ACTIVE student records are rolled forward using the "Increase" option.

   You may use the **Setup > Archive options** to automate this task.

3) Use the "Setup Increase option" to automatically increase the session by 1 and year by 1, for all ACTIVE existing students. This updates the entries in the Main Student Database with a single key press! {Use the "Setup Decrease option" to reverse the effect of "Setup Increase", if used by mistake.} The placement number field is updated automatically as a student is placed. You can always check and change if necessary the placement number for each student. {Using Student Examine/Edit Option}

   If a student fails & has to have a year out you may wish to move the record temporarily out of the way. Do this by changing the ACTIVE display to ARCHIVED. If he/she rejoins the course reset to ACTIVE - this ensures that the student's data is retained.

4) You will need to clear the details relating to Current Applications from ALL company records :Use the "Setup Delete Interviews option", "Setup Delete Applications Option" & “Setup Delete Jobs Option” to delete the interview, current application and job details from all records - this clears all fields with a single key press so that you are ready to start with the new session placement details.
5) To contain the size of the student database you may, if required, delete the details of students who have not undertaken any placements from the student database - use the Student Examine/Edit option in datasheet view to easily delete blocks of students. Take a backup first!

   Note : The Referential Integrity rules built-in to the application to ensure consistent data will not allow you to delete any students with related placement records. To delete such students you would first need to delete their Placement records using the Main Menu Placements Options. {If you decide to do this it would be best to delete complete cohorts, to avoid inconsistent Placement Reports!}

6) Use the Student Examine/Edit option to enter details of any new student cohorts, making use of the "copy" button to duplicate common fields such as course, year, placement and session.
7) Set the placement "required" Yes/No toggle field to Yes (checked) to define which students require placements during the current session. Clear toggles for students from previous years not requiring a placement.
8) You may also easily set or clear the Student "Placed" Yes/No toggle field, as required.

7 : Examine/Edit Data

7.1 Company Examine/Edit {Main Company Database}

7.1.1 Main Company Information

Use the Company Examine/Edit option to browse through existing company records, edit existing information or enter new details. A typical company is shown in Section 7.1.20.

To maintain referential integrity it is not possible to delete a company record while placement details remain in the associated placement pop-up. It is unlikely that you will want to delete any company records - to maintain accurate records it is generally preferable to change the ACTIVE display to ARCHIVED and indicate in the Further Information region the reasons.

Each company record must be given a unique code, which is used to order the records alphabetically. Use informative codes such as GECELECWARLEY, not short cryptic ones. In this Windows version you may change the code at any time as the powerful Access cascade update feature will automatically update the link to any related tables. If a new code is unique then the record will be posted (saved) when you move from the record. Otherwise you will be prompted with a message to modify the code - it is not possible to save duplicate key codes. When using the Mail option for standard letters & address labels, letters use Dear {title field} so Dear Bob would be printed when the title field is Bob. The name & address printed on standard letters lists contact1, status and address - the line-squeeze facility ensures that no gaps are left if the status field or any address fields happen to be blank.

The fields for location, employer, letter, reply and the five user definable option fields all have associated “look-up” tables which can be displayed by pressing the [F4] key.

The toggle Yes/No fields for “past employer”, “current employer”, “Health&Safety” and the six User-definable toggles facilitate the easy filtering of records via the PineSoft Filter Button or Selection Criteria in Report options.

Note : the letter code field is updated automatically when you use the Mail output options to print a letter, so will give you a record of the last letter sent to the company.

7.1.2 User Definable Fields

The eleven field names initially labelled userlook1,... 5 and usertitle1 - usertitle6 and the six toggle fields compflag1, ... compflag6 as shown in Section 7.1.20 of the manual may be customised to suit your own particular requirements using the Setup submenu options {see section 5.1}.

7.1.3 Company Details for Placement Notice Reports {Memo Field}

The Company Details region is intended for specific factual information about the company - this information along with the company’s address is included in the Possible Placement Report, to inform students about a possible placement.

7.1.4 Company Further Information {Memo Field}

Use this Memo field region to maintain any required details about correspondence etc. with the company.

7.1.5 Company Correspondence Log {Memo Field}

When you send a group of letters or emails you have the option of recording the details in the Correspondence Log region to give you a historical record.

7.1.6 Interview Details

The interview details are used in the Company - Interview report which also lists details of student interviews from the Current Applications pop-up - see below.

7.1.7 Pop-up Forms

A major feature of the application is the ability to pop-up additional information relating to the current company record via the PineSoft Buttons displayed in the Form Header. See Section 4.4 for an overview. Click on the required button to display a pop-up. You may display more than one pop-up at a time, move them, resize them and switch easily between them by clicking with your mouse. See Section 7.1.21 for illustrations.

When entering or editing pop-up records the record marker changes to the edit pencil icon - make sure that you save the new pop-up record, by closing the pop-up, or pressing [F9], or moving to another pop-up record before moving to another Main Record.

7.1.8 Company Contacts {Pop-up Form}

In addition to the main company contact you may use this pop-up form, illustrated in Section 7.1.20, to maintain details of as many other contacts as you require.

7.1.9 Current Application Details {Pop-up Form}

Use this pop-up form, illustrated in Section 7.1.21, to maintain details of student applications. The pop-up in the company record is the most convenient way of entering these details as you will normally be nominating a number of students at the same time for a specific company. {Note :These details should be cleared at the start of each Placement Session - see Section 6.1}. With the cursor in the student code field press the keyboard [F4] or click with your mouse to display the "look-up" table - select the required student and automatically insert the student's name, course, year and placement number {no chance of error - no typing!}. Only students' whose "required" flags are enabled in student records are displayed. Click on the Job Ref drop-down to select the required job (only jobs where the number of vacancies is greater than zero are listed.)

Enter application and interview dates if known using the dd/MM/yyyy format {as defined via International/Regional settings in Windows} - invalid dates will not be accepted. Alternatively use the Pop-up calendar which automatically uses 4 digit years from 2000. The "offer" and "accept" Yes/No toggles make it easy to see the offers made and those accepted. The "placed" field is a read-only flag from the student's record, to inform you of the current status. The "info" field may be used for job references, or other, details if required. You may enter as many students as you like as the window automatically scrolls to accommodate any number of students. The three new toggle fields "I", "R" & "S" introduced in version 3.0 may be used to monitor items (application forms etc.) "issued" to students, "returned" to the Placement Office and "sent" to the company. Just leave these toggle fields blank if you do not wish to monitor these details.

7.1.10 Add New Placement Details {Pop-up Form}

Use this pop-up to add new placement records, where you may look-up the details of the placed student and job vacancy automatically via drop-down lists.

7.1.11 Placement Details {Pop-up Form}

The placement pop-up, illustrated in Section 7.1.21, displays details of past and present students as well as visiting tutor, supervisor's names etc. **Note :** the Summary text region should contain information about the actual placement - project details etc. The Job Details memo text region is designed for other information, such as how to get there, who the visiting tutor should contact, reminders etc. This Job Details text is only printed in the One Per Page Full Placement Reports designed to give comprehensive details to Visiting Tutors.

Note : click on the Tasks Button if you want to maintain a record of visits etc.

Any displayed details may be updated at any time.

7.1.12 Student Records {Pop-up Form}

Use this pop-up to view student records while browsing the company form

7.1.13 Company Jobs {Pop-up Form}

Use this pop-up to enter new jobs and to maintain details of any existing jobs at the company.

7.1.14 Company Tasks {Pop-up Form}

Use this pop-up to maintain details of any company tasks, consultancies etc.

7.1.15 Copying a Company Record

Use the Copy button to copy a complete company record. You will need to modify the company code in the copied record so as to make it unique, otherwise it can't be saved. Use [Esc] or the Undo buttons to abort.

7.1.16 Deleting a Company Record

Use the Delete button to delete a complete company record. It is normally best to keep most records for accurate historical records. For safety you are always given the option of cancelling a record delete operation. The PineSoft database structure will not allow you to delete a company record if there have been any student placements at the company, as deleting such companies would lead to inaccurate placement reports!

7.1.17 Exporting Data to a Word Mail Merge File

It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Word Mail Merge Format. (Text .txt file format is used). You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility.

Exported data may then be accessed directly from Word using the User Friendly options available - see your Microsoft Word documentation for details.

7.1.18 Exporting Data to a Microsoft Excel File

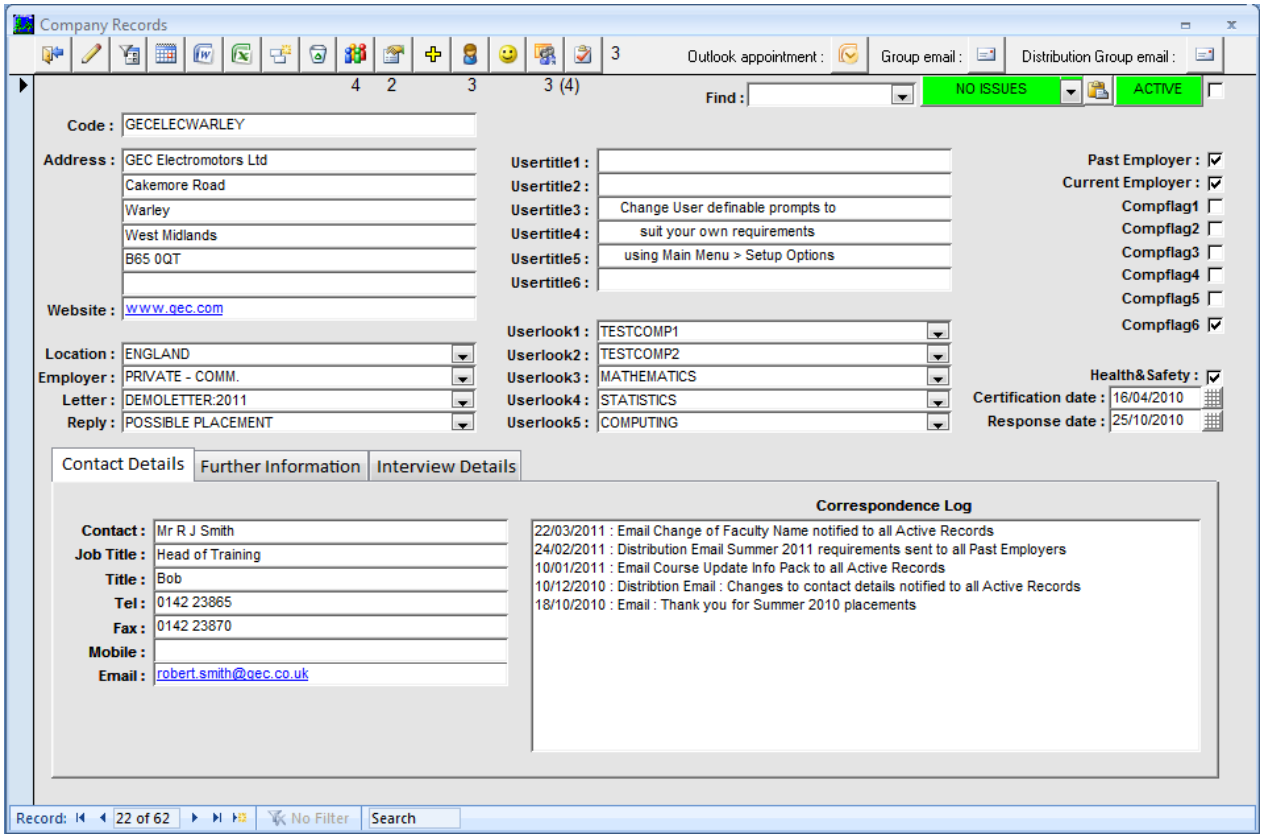
It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Excel Format. You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility.

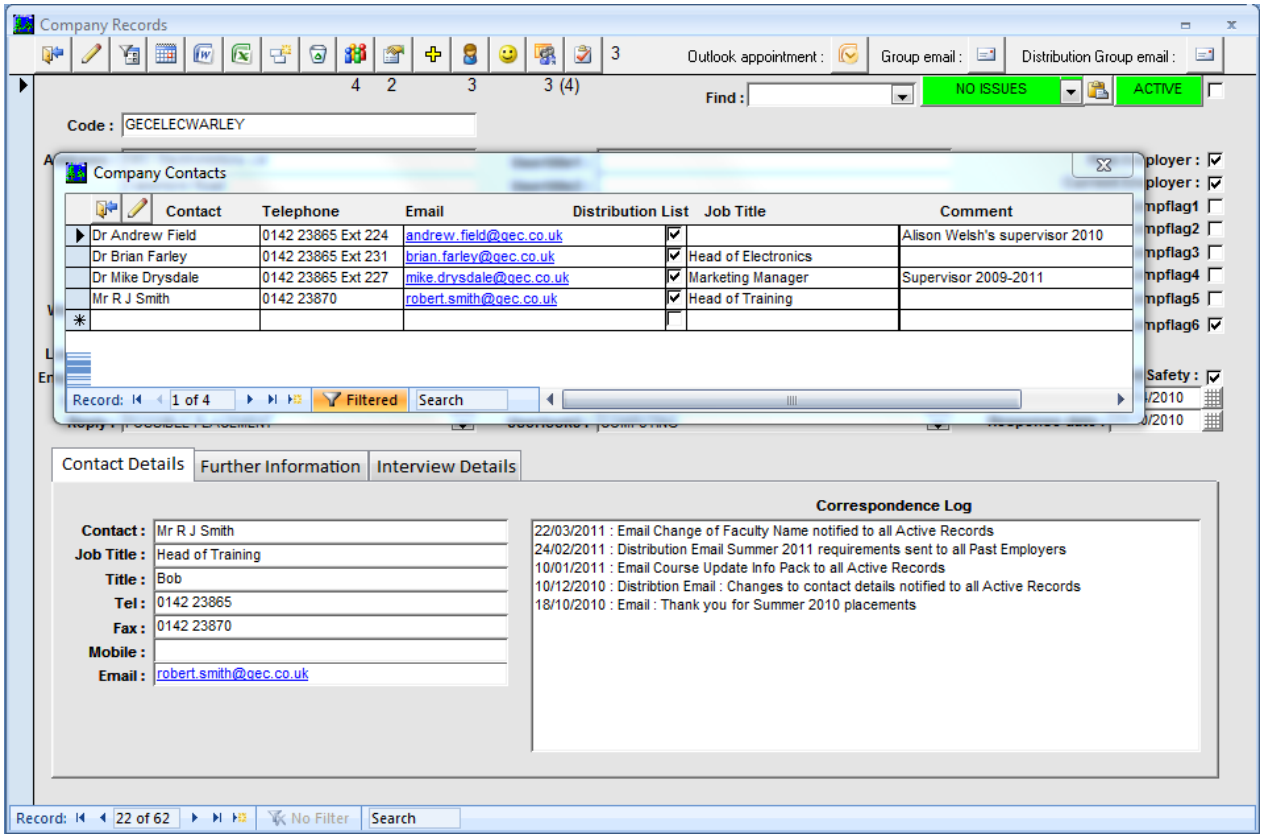
Exported data may then be accessed directly from Excel - see your Microsoft Excel documentation for details.

7.1.19 Status and Archiving

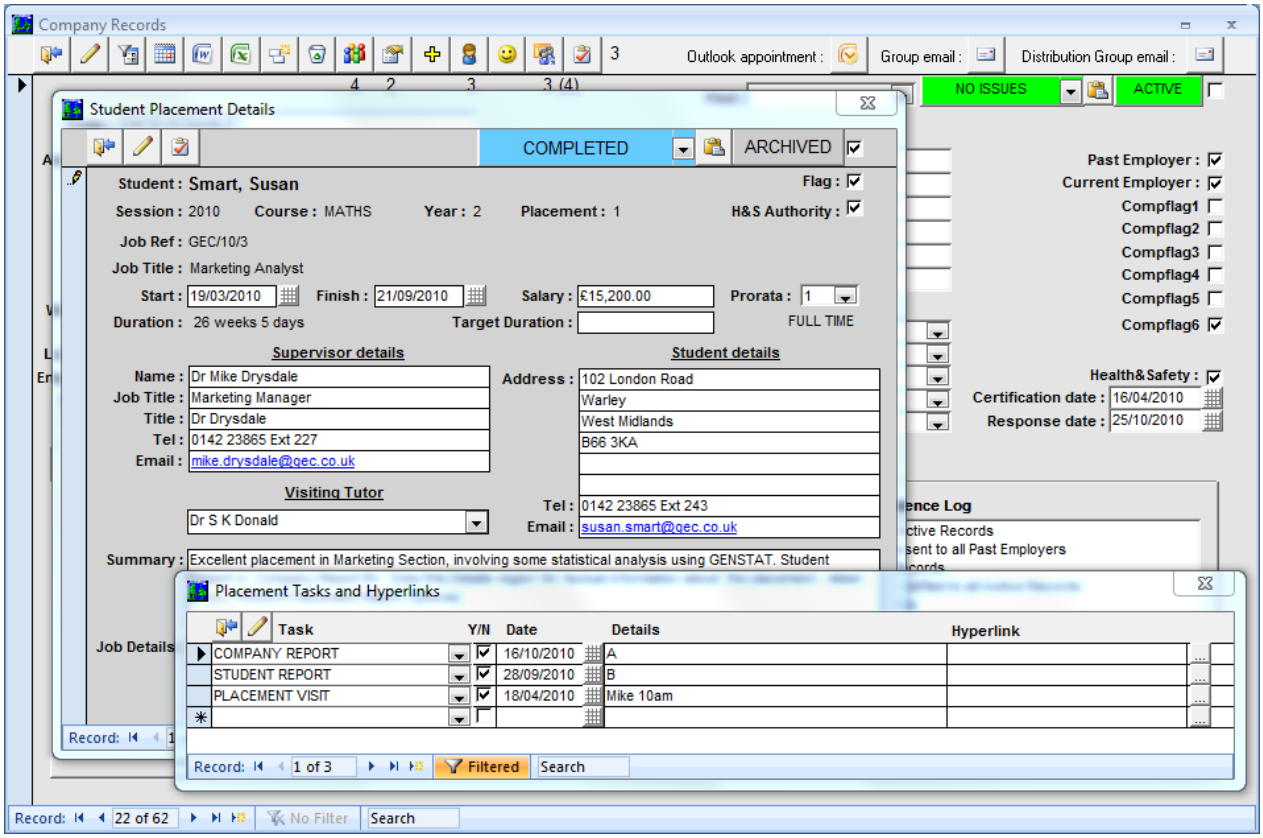
Change the NO ISSUES display to ACTION REQUIRED to flag any records for action - use the pop-up Status Memo to record any specific details. The ACTIVE display may be changed to ARCHIVED to give further flexibility when filtering records.

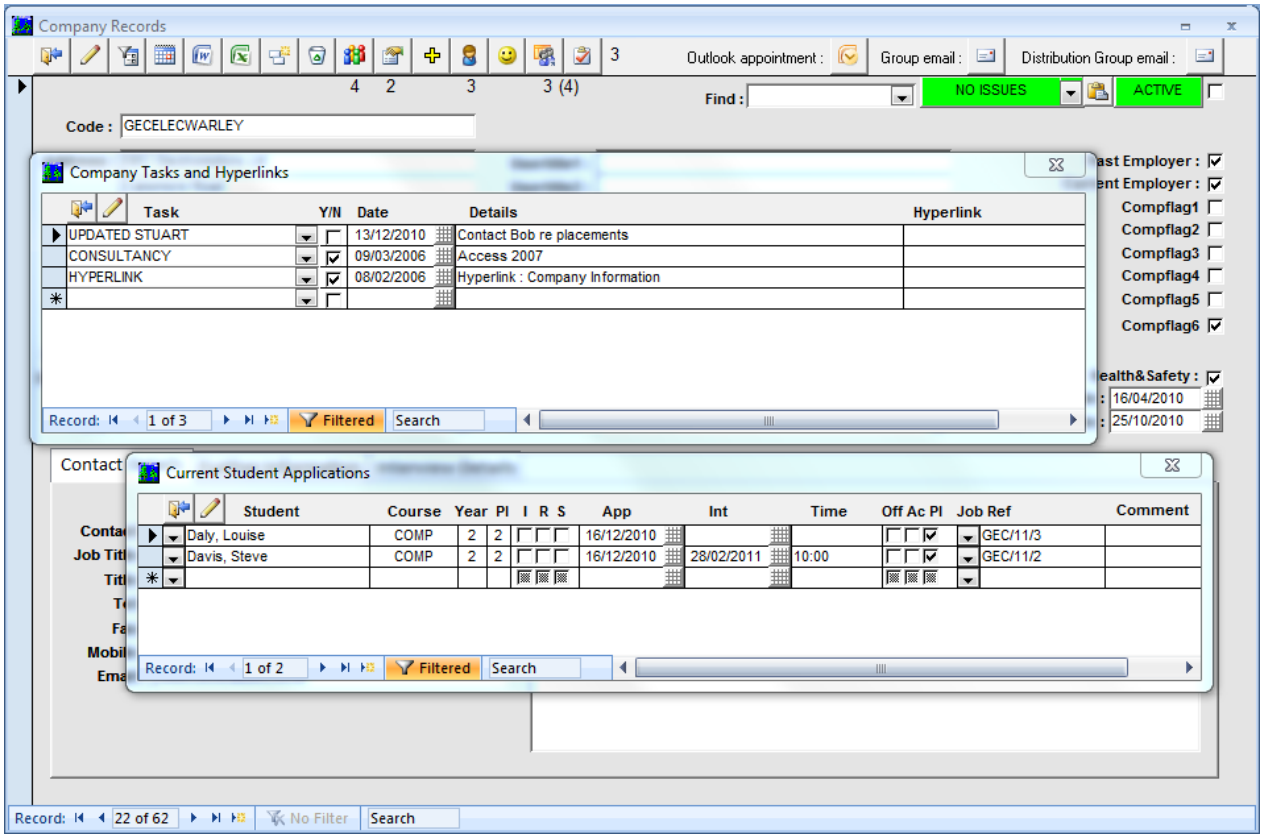
7.1.20 Illustration of a Typical Company Record





7.1.21 Illustration of a Typical Company Record with Pop-up's





7.2 Student Examine/Edit {Main Student Database}

7.2.1 Main Student Information

The first page of a student's record contains basic student details. Each student record must be given a unique student code. Use the format SURNAME_FORENAME and the application will automatically insert entries in the surname,fname, mailname and title fields - quite a time saver! If you omit the under-score character "_" the automatic insertion will not take place. Use unique codes, such as SMITH_JOHN1, SMITH_JOHN2 etc if you have duplicate student names.

For the correct operation of mail and report options it is essential that you complete entries for surname,fname, mailname, title, year, placement number, session and course fields. As these are "required fields" you have to provide entries before you can save the record. These details should be entered carefully as this information is frequently used in other parts of the database and entered later via "look-up" tables. {For the Academic Year October 2013/2014 enter the session field as 2014}.

The fields for mail name, title, home & term address are used in the Mail option {see section 7.4} for standard letters and address labels. You may use the copy button, , to copy term address to home address fields if they are the same. The course, tutor, nationality and letter fields all have associated "look-up" tables which may be displayed by pressing the [F4] key.

The User definable options1, ... 5 with initial prompts userlook1 ... userlook5 fields also have associated "look-up" tables and give extra flexibility when selecting subgroups of records. For example, use options1 to define subject or course options such as MATH + PHYS, MATH + COMP etc.

Enter dates using the Pop-up calendar or format dd/MM/yyyy {as defined via International/Regional settings in Windows} - only valid dates will be accepted. The reference number field may be omitted if required - it will not affect the operation of the application. The placement "required" flag should be set for all students currently looking for a placement - only such students will show up in Application look-up's and Student Placement Look-up's. Once a student is placed using the "Add New Placement" pop-up the "required" flag is automatically switched off and the "placed" flag enabled. These Yes/No flags make it easy to select those students requiring a placement in the current session and those placed or still requiring a placement. The Health & Safety Yes/No toggles are used to record whether the student has been briefed and received an information pack, to comply with the Health & Safety requirements.

7.2.2 Student Photographs

Using the "Student Examine/Edit" option photographs may be inserted into the database and are always displayed.

Photographs are stored in a folder (recommended file format .jpg or .bmp using the student name as the file name e.g. SMITH_JIM.jpg etc.). As these files are stored outside the database they do not contribute to data bloat! Double click the photograph to view or add photographs.

The best way to handle student photographs is to crop and resize them using a Paint/Image Editing package such as Microsoft Photo Editor or Paint. A little experimentation is required to obtain the best results with a small file size. The demonstration database uses digital photographs re-sized to 150 x 200 pixels (standard 4:3 photograph size) and are about 90KB. You should be able to get about 12 top quality bmp images per 1 MB of disk space. **See on-line help for the latest advice.**

7.2.3 User Definable Fields

The nine field names initially labelled userlook1 - userlook5 and usertitle1 - usertitle4 and the five User-definable toggle fields studflag1 - studflag5 as shown in Section 7.2.20 of the manual may be customised to suit your own particular requirements using the Setup submenu options {see section 5.1}.

7.2.4 Student Personal Details Tab

This Tab contains student personal details.

7.2.5 Student Preferences Tab

This Tab contains details of the student job preferences

7.2.6 Student Further Information Tab {Memo Field}

Use this Memo field region to maintain any required details about correspondence etc. with the student.

7.2.7 Student Reference Tab {Memo Field}

Enter a student reference in this auto scrolling memo field. Via the report options {see section 8} you may print references with or without a photograph of the student. Use headed paper when printing a reference which will incorporate the text “To whom it may concern” and the student’s name, before the text of the reference.

7.2.8 Student Skills Tab {Memo Field}

Maintain details of student General and IT specific skills

7.2.9 Student Special Circumstances Tab {Memo Field}

Use to record any specific Special Circumstances

7.2.10 Student Correspondence Log Tab {Memo Field}

When you send a group of letters or emails you have the option of recording the details in the Correspondence Log region to give you a historical record.

7.2.11 Pop-up Forms

A major feature of the application is the ability to pop-up additional information relating to the current student record via the PineSoft Buttons displayed in the Form Header. See Section 4.4 for an overview. Click on the required button to display a pop-up. You may display more than one pop-up at a time, move them, resize them and switch easily between them by clicking with your mouse. See Section 7.2.21 for illustrations.

7.2.12 Current Application Details {Pop-up Form}

Use this pop-up form, illustrated in Section 7.2.21, to maintain details of student applications. The pop-up in the company record is the most convenient way of entering these details as you will normally be nominating a number of students at the same time for a job at a specific company. {**Note :** These details should be cleared at the start of each Session - see Section 6.1}.

As you can see the application automatically displays the details of each job the student has applied for by linking and looking up information in the applications, jobs and company database. You may enter or update application and interview dates using the dd/MM/yyyy format . Alternatively use the Pop-up calendar which automatically uses 4 digit years from 2000.

7.2.13 Placement Details {Pop-up Form}

The placement pop-up, illustrated in Section 7.2.21, displays details of past and present students as well as visiting tutor, supervisor’s names etc. **Note :** the Summary text region should contain information about the actual placement - project details etc. The Job Details memo text region is designed for other information, such as how to get there, who the visiting tutor should

contact, reminders etc. This Job Details text is only printed in the One Per Page Full Placement Reports designed to give comprehensive details to Visiting Tutors.

Note : click on the Tasks Button if you want to maintain a record of visits etc.

Any displayed details may be updated at any time.

7.2.14 Student Tasks {Pop-up Form}

Use this pop-up to maintain details of any student tasks, reports, projects etc.

7.2.15 Copying a Student Record

Use the Copy button to copy a complete student record. You will need to modify the student code in the copied record so as to make it unique, otherwise it can't be saved. Use [Esc] or the Undo buttons to abort.

7.2.16 Deleting a Student Record

Use the Delete button to delete a complete student record. For safety you are always given the option of cancelling a record delete operation. The PineSoft database structure will not allow you to delete a student record if there have been any student placements at the company, as deleting such records would lead to inaccurate placement reports!

7.2.17 Exporting Data to a Word Mail Merge File

It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Word Mail Merge Format. (Text .txt file format is used). You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility. You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility. Exported data may then be accessed directly from Word using the User Friendly options available - see your Microsoft Word documentation for details.

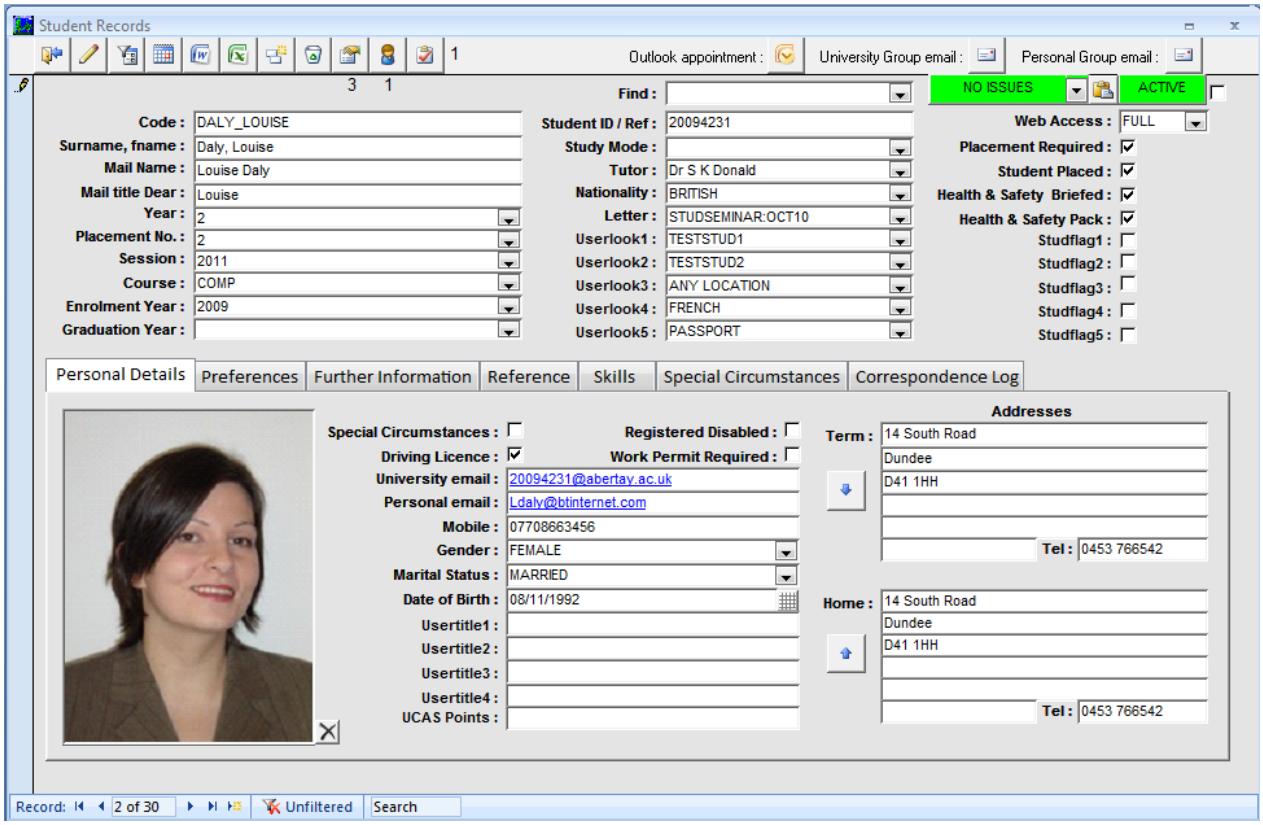
7.2.18 Exporting Data to a Microsoft Excel File

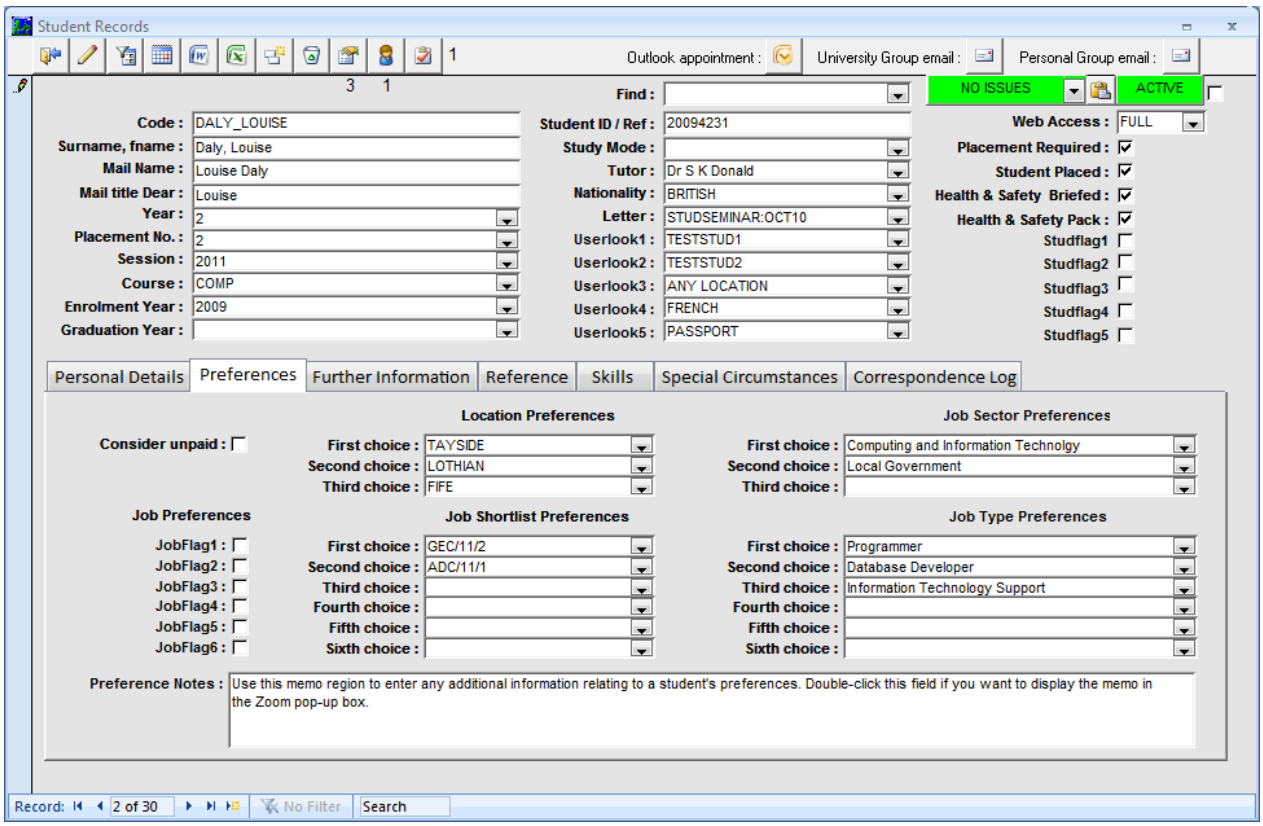
It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Excel Format. You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility. Exported data may then be accessed directly from Excel - see your Microsoft Excel documentation for details.

7.2.19 Status and Archiving

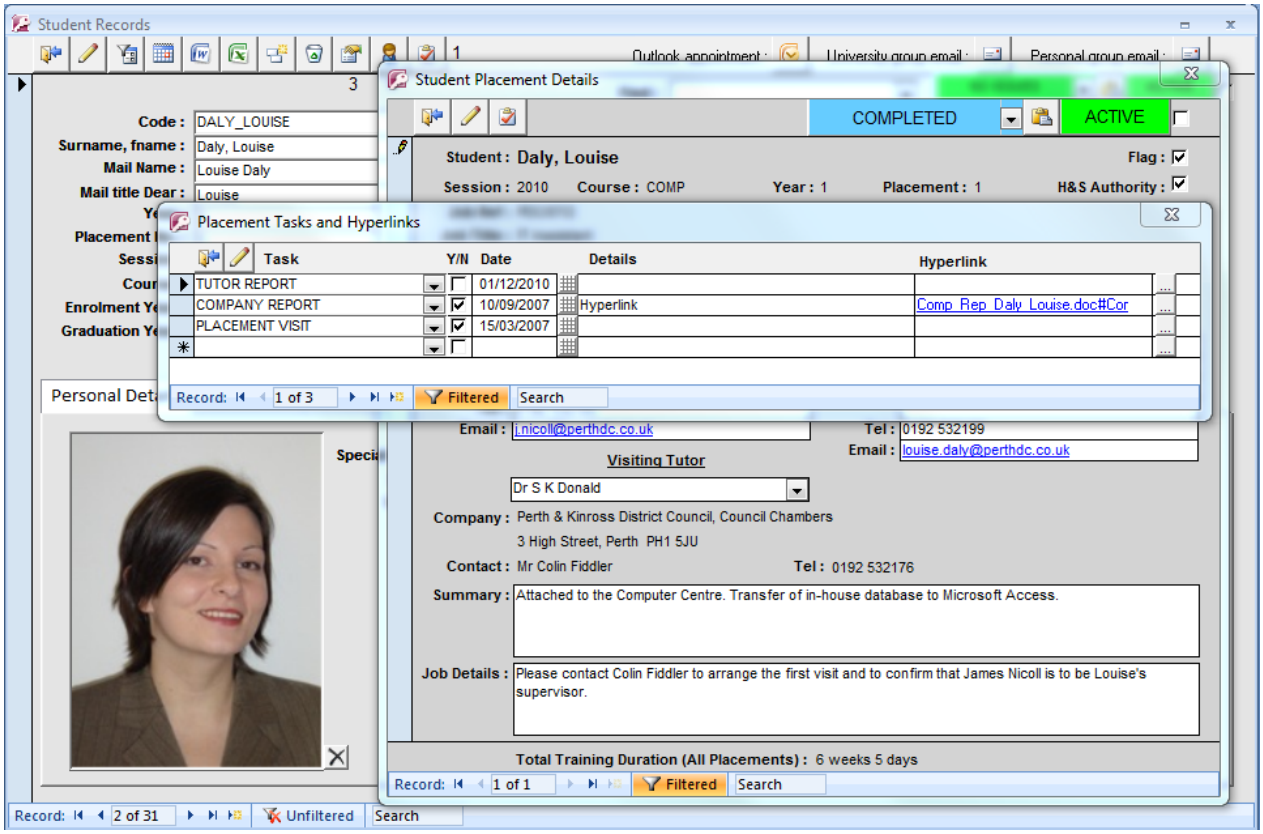
Change the NO ISSUES display to ACTION REQUIRED to flag any records for action - use the pop-up Status Memo to record any specific details. The ACTIVE display should be changed to ARCHIVED when students have graduated - this excludes them from the New Session Roll-over "Increase" option and gives further flexibility when filtering records.

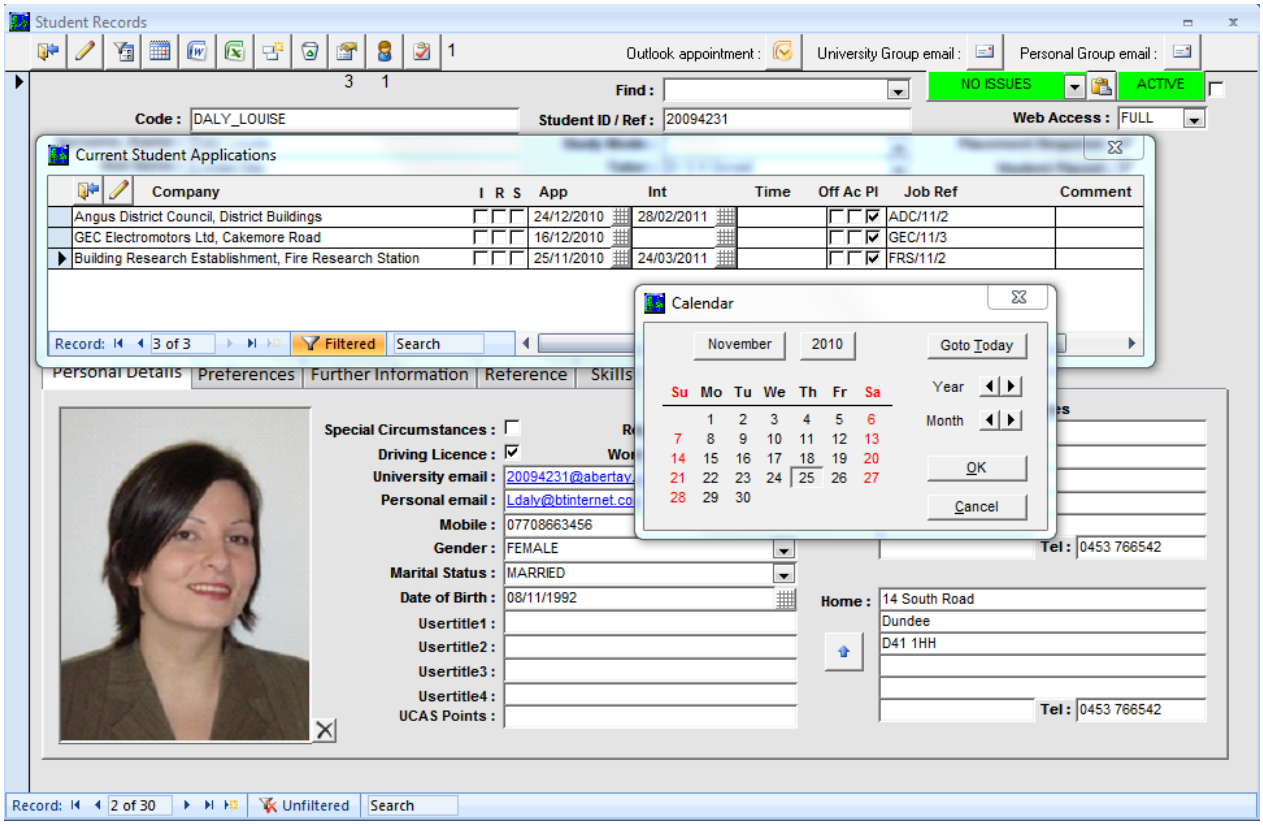
7.2.20 Illustration of a Typical Student Record





7.2.21 Illustration of a Typical Student Record with Pop-up's





7.3 Jobs Examine/Edit

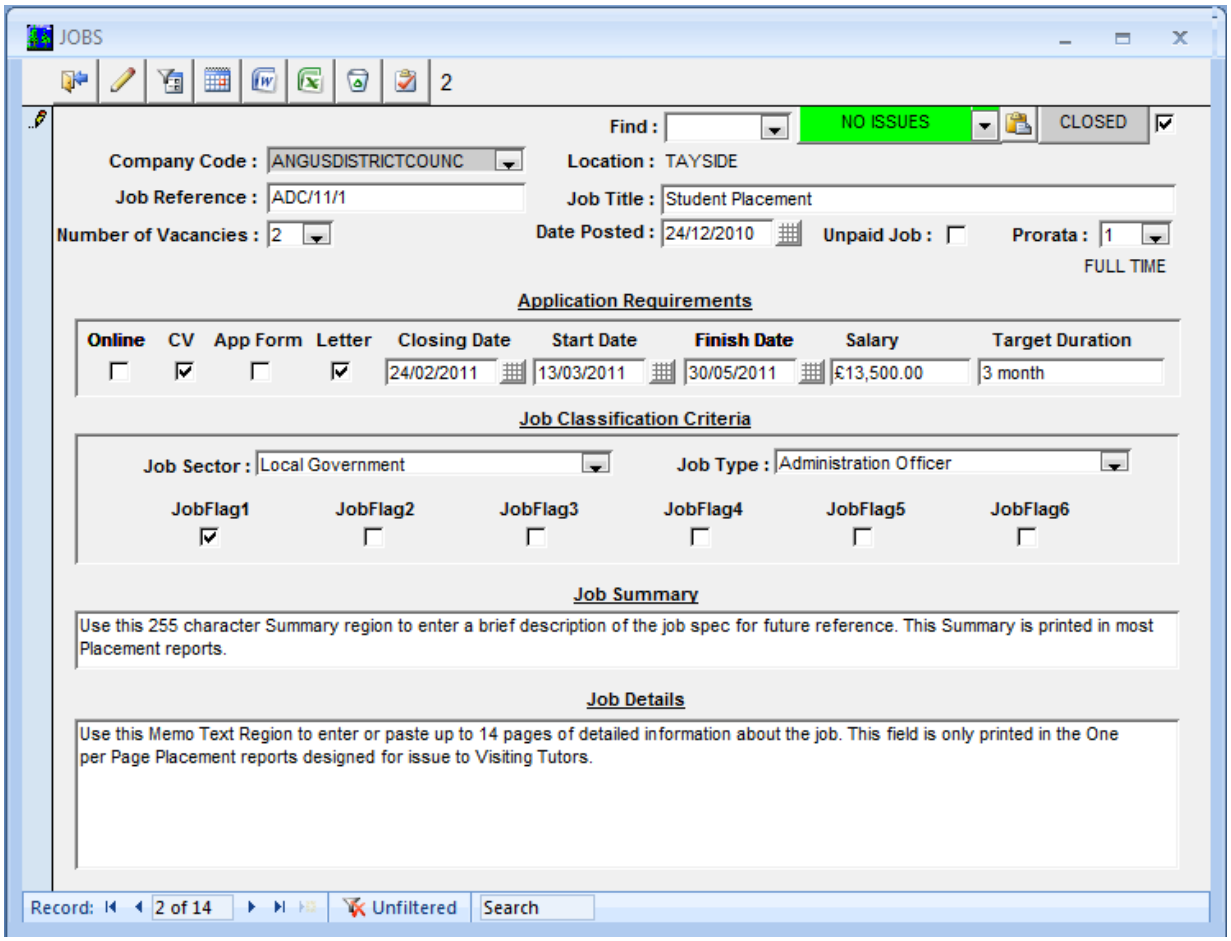
The Main Menu Jobs option gives direct access to all jobs, however, it is recommended that new job details are entered via the "Jobs" Pop-up in Company forms.

- You must define a unique Job reference (such as ADC/1). The Company code, location and Date Posted are inserted automatically.
- If required you may modify the default Job Title of "Student Placement" and the default "Number of Vacancies" which is initially entered as 1.

Note : As students are placed at specific jobs the "Number of Vacancies" field is automatically reduced by one. Once equal to zero, the job will not appear in lists of available jobs in Student Application forms or Add New Placement forms. You may also "remove" a job from application and placement drop-downs by setting the Jobs ACTIVE flag to CLOSED.

- Complete entries in the "Application Requirements" group, if required.
- The eight "Job Classification Criteria" prompts are User-definable and may be used to select jobs matching student requirements.
- The "Job Summary" field is 255 characters long and the "Job Details" region is a Memo field (14 A4 pages) so extensive details may be entered or pasted there.

You may display NO ISSUES / ACTION REQUIRED and ACTIVE / CLOSED to facilitate filtering. Use the pop-up Status Memo to record any specific details.



7.4 Placements Examine/Edit

The Main Menu Placements option gives direct access to all records in the placements database and is best used to browse through existing placements. **To prevent users inadvertently changing correctly entered link data, all link fields are locked.**

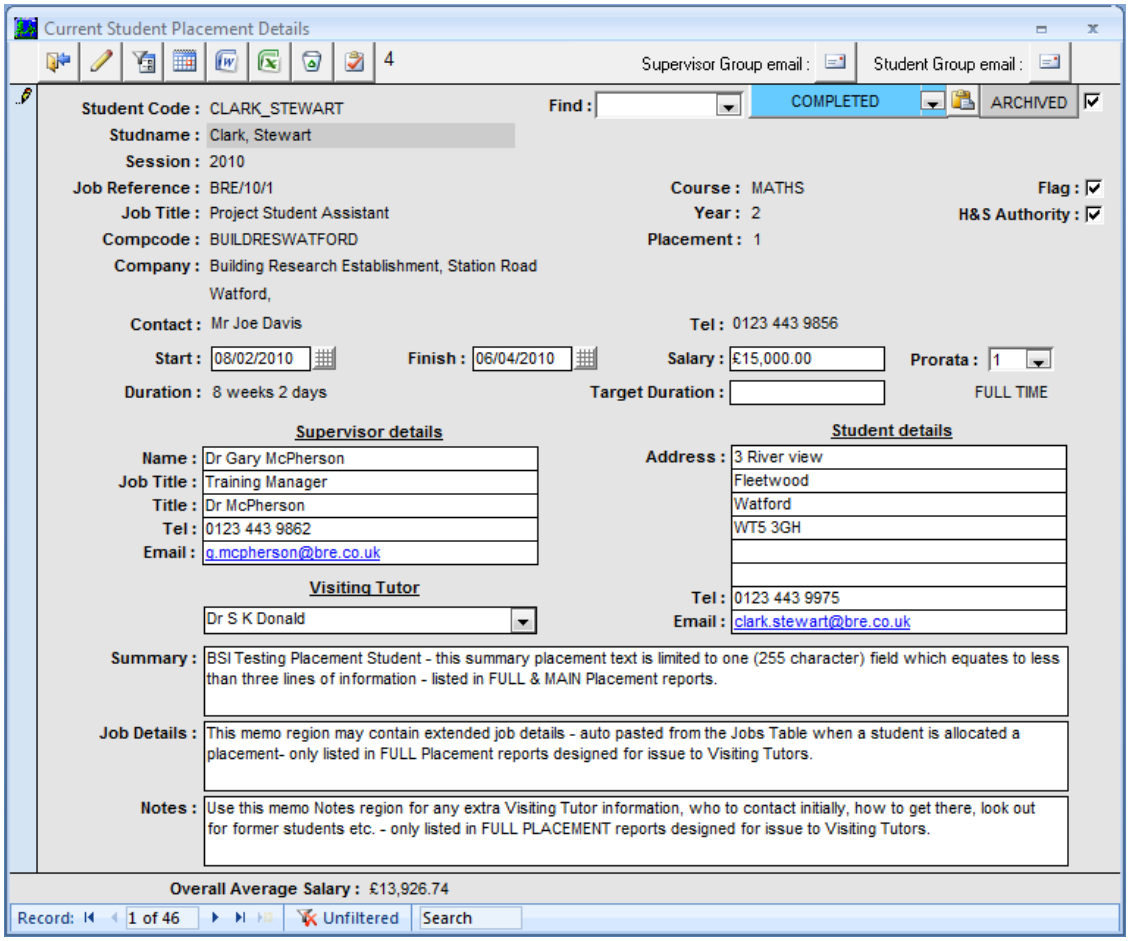
New placement details are entered via the Add Placement Pop-up in Company forms.

- Use the Student Code drop-down list to select the required student; the student's name, course, session, year and placement number are entered automatically by looking up the information in the relevant student record **(only students whose "required" flag is enabled are displayed - it is clearly of crucial importance that student details in the Main student database are correct - use the Main Menu Student Examine/Edit option to check or correct the information, if required.)**

- Use the Job Reference drop-down list to select the required job - the job & company details are entered automatically by looking up the information in the relevant company record. The number of vacancies, for the selected job is automatically reduced by one.

Use the Visiting Tutor drop-down list to enter details of the visiting tutor, if known. {To add additional names to the visiting tutor list use the Setup Options described in Section 5.1}. Enter any other known details such as telephone numbers, emails etc. **These details may always be added or corrected later via the Main Menu or Pop-up** **Placement forms.**

The flag field is automatically set to Yes and you may display ONTARGET / ACTION REQUIRED / COMPLETED / FAILED TO COMPLETE and ACTIVE / ARCHIVED to facilitate filtering of required groups of placement records. Use the pop-up Status Memo to record any specific details


Current Student Placement Details
Supervisor Group email :
Student Group email :
Student Code : CLARK_STEWART
Find :
COMPLETED
ARCHIVED
Studname : Clark, Stewart
Session : 2010
Job Reference : BRE/10/1
Course : MATHS
Flag :
Job Title : Project Student Assistant
Year : 2
H&S Authority :
Compcode : BUILDRESWATFORD
Placement : 1
Company : Building Research Establishment, Station Road
Watford,
Contact : Mr Joe Davis
Tel : 0123 443 9856
Start : 08/02/2010
Finish : 06/04/2010
Salary : £15,000.00
Prorata : 1
Duration : 8 weeks 2 days
Target Duration :
FULL TIME
Supervisor details
Name : Dr Gary McPherson
Job Title : Training Manager
Title : Dr McPherson
Tel : 0123 443 9862
Email : g.mcpherson@bre.co.uk
Visiting Tutor
Dr S K Donald
Student details
Address : 3 River view
Fleetwood
Watford
WT5 3GH
Tel : 0123 443 9975
Email : clark.stewart@bre.co.uk
Summary : BSI Testing Placement Student - this summary placement text is limited to one (255 character) field which equates to less than three lines of information - listed in FULL & MAIN Placement reports.
Job Details : This memo region may contain extended job details - auto pasted from the Jobs Table when a student is allocated a placement- only listed in FULL Placement reports designed for issue to Visiting Tutors.
Notes : Use this memo Notes region for any extra Visiting Tutor information, who to contact initially, how to get there, look out for former students etc. - only listed in FULL PLACEMENT reports designed for issue to Visiting Tutors.
Overall Average Salary : £13,926.74
Record: 1 of 46
Unfiltered
Search

NOTES :

(1) The Summary text region is designed for specific information about the nature of the placement - these details are printed in all “placement” reports. (255 char max)

(2) The Job Details memo region is designed for full job details (64000 char max), while the Notes memo is for other information, such as how to get there, who the visiting tutor should contact, reminders etc. The Job Details & Notes text is only printed in the One Per Page Full Placement Reports designed to give comprehensive details to Visiting Tutors.

(3) Click on the Tasks Button if you want to maintain a record of actual visits, return of reports etc. - see in Section 7.1.21 for an illustration of the Tasks pop-up when opened.

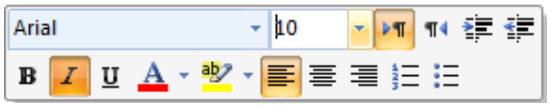
(4) Use the Examine/Edit Current Placement Options, if required, to browse existing records - sort on Student Code to identify any duplicate records which are easy to delete.

7.5 Letters Examine/Edit

You may create an unlimited number of letters and these letters may be Mail Merged to incorporate details of company contacts, supervisors, students etc. See section 8.2 of the Report/Mail Output options for full details. Arial 10 point is recommended for the letter text.

A typical letter is shown in Section 7.6.1. Each letter is given a unique letter code of your choice. Use codes that you will easily recognise, for easy selection during Mail Merge output. For example, MAILSHOT1:1JUNE12, GECELEC:5JAN13 etc.

To give as much flexibility as possible there are three fields Ref1, Ref2 and Date which print above the address and three fields header1, 2, 3 which print on the right hand side of the page below the address. The main letter text region is a Rich-text Memo field – mark a section of text and hover to display the font and formatting options toolbar, shown below.



Via the Printer Setup options you will be able to adjust the margin settings for printed letters so you should have enough flexibility to position any required references or date to suit your particular headed paper. It may be that you decide to use only one or two of the six fields. For example, use header3 for the date if you prefer to see it on the right hand side of your letters.

Note : once you have experimented and decided on which fields to use you can reposition and resize the fields used so that they are displayed together when you view letters in datasheet format. PineSoft buttons for copying, deleting and exporting data to Microsoft Word or Excel are again available in the form header - the use of these buttons was discussed in the sections on Examining/Editing Company and Student records.

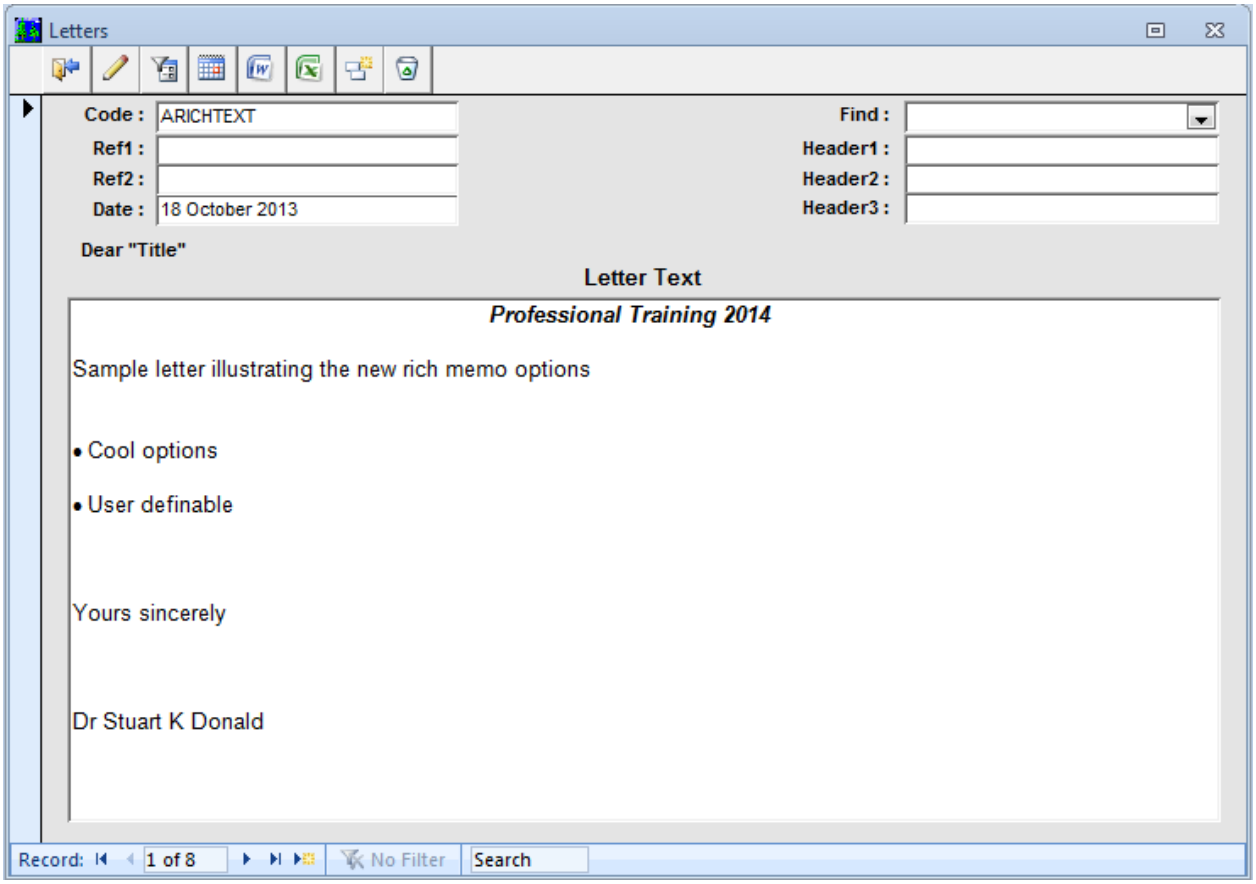
7.6 Memos Examine/Edit

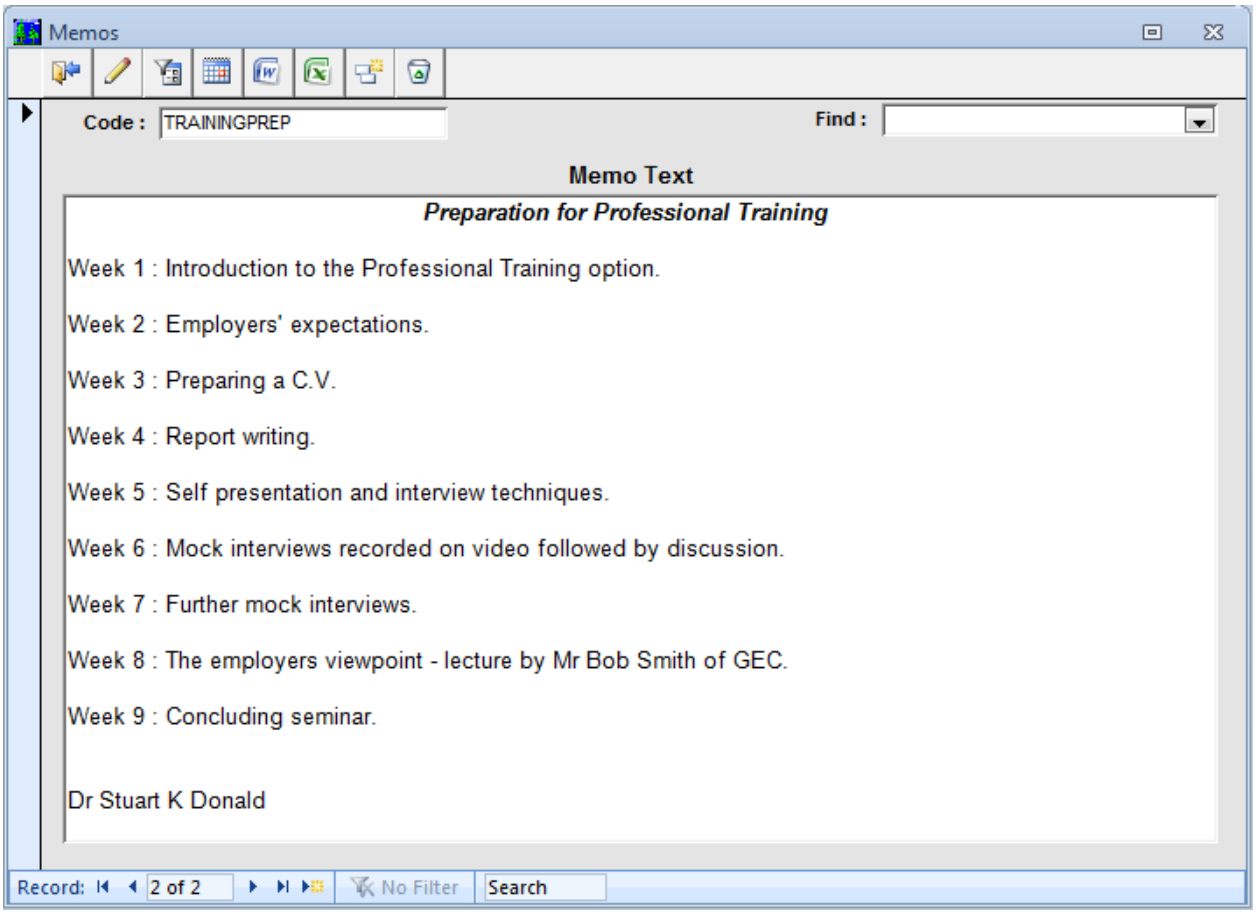
You may create an unlimited number of memos and these memos may be printed with or without a “MEMO Header” which incorporates Institute and Department names. See section 8.2 of the Report/Mail Output options for full details.

A typical memo is shown in Section 7.6.1. Each memo is given a unique code of your choice. The use of informative date stamped codes for memos, such as CVSEMINAR:7NOV13 is recommended and will act as a prompt come the following November that it is time to circulate details about the seminar on C.V. preparation. The main memo text region is a Rich-text Memo field – mark a section of text to display font and formatting options.

PineSoft buttons for copying, deleting and exporting data to Microsoft Word or Excel are again available in the form header - the use of these buttons was discussed in the sections on Examining/Editing Company and Student records.

7.6.1 Illustration of a Typical Letter and Memo record




Memos
Code : TRAININGPREP
Find :
Memo Text
Preparation for Professional Training
Week 1 : Introduction to the Professional Training option.
Week 2 : Employers' expectations.
Week 3 : Preparing a C.V.
Week 4 : Report writing.
Week 5 : Self presentation and interview techniques.
Week 6 : Mock interviews recorded on video followed by discussion.
Week 7 : Further mock interviews.
Week 8 : The employers viewpoint - lecture by Mr Bob Smith of GEC.
Week 9 : Concluding seminar.
Dr Stuart K Donald
Record: 2 of 2
No Filter
Search

7.7 Applications Examine/Edit

The Applications Main Menu option is designed to give access to the underlying database table for Student Applications. This table refers to **Current Applications** and must be deleted at the start of a new session.

7.8 Contacts Examine/Edit

The Contacts Main Menu option is designed to give access to the underlying database table for Extra Company Contacts.

Note : you will generally view placement, application and contact details from the main database tables via the pop-up forms which automatically display the appropriate linked records.

7.9 Tasks & Hyperlinks Examine/Edit

The Tasks & Hyperlinks submenu gives access to the Company, Student, Jobs and Placement tables for monitoring tasks such as Consultancies, Reports, Placement Visits etc. You may easily define hyperlinks to external files, so you may, for example, link to Student CV's in word or pdf format.

7.10 Health & Safety

The Health & Safety option gives access to a summary of all the H&S requirements for all placed students. The PineSoft Filter by Form option make it easy to filter required records to check for any shortcomings.

8 : Report/Mail Output

8.1 Report List

8.1.1 Overview of Report Options

Over 90 report options are provided to enable you to analyse and summarise the data contained in the databases of the application. Output for each report may be previewed on screen, then output to a printer or a file on disk. The reports are date stamped, page numbered and incorporate Institution and Departmental/School Headers to give customised output.

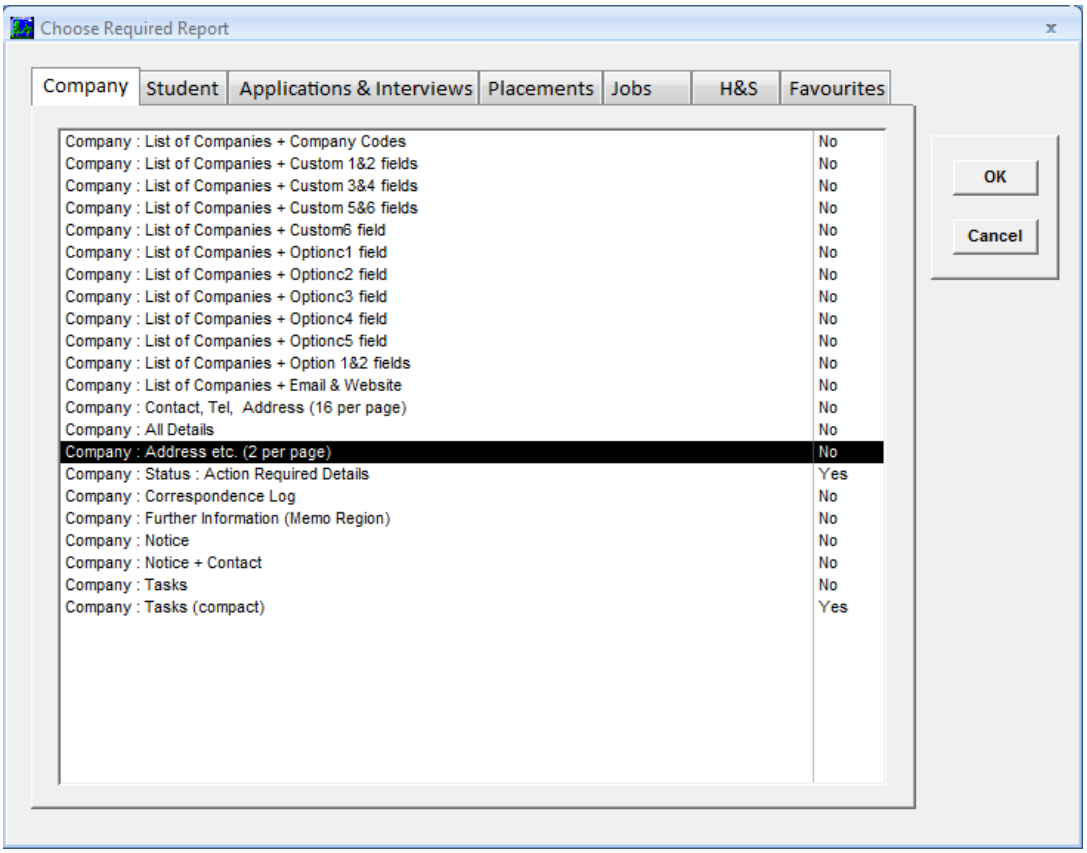
Via the use of "bullet-proof" dialog box choices you may choose particular subgroups of records using company codes, student name, course, session, year, tutor etc. The actual dialog box options will match each particular report group. The illustration below focuses on selecting the "Company Address + Other Details" report which lists records three per printed page.

Note : an alternative and flexible method of selecting any number of records at random, is provided by the "Select Individual Records" option.

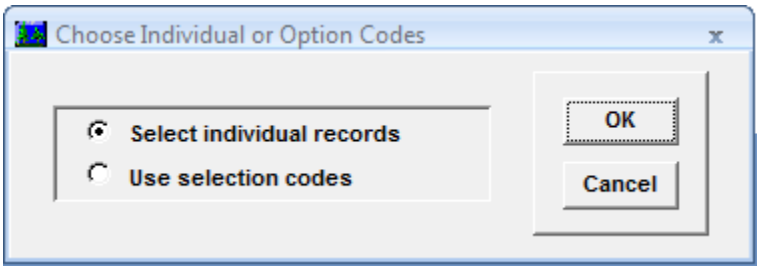
To enable you to locate specific reports more easily they have been listed in 6 groups. An overview of each group of reports is given in Section 8.1.3, as new reports are added from time to time - see the application for the latest options.

8.1.2 Example, showing how to select, preview & print a report

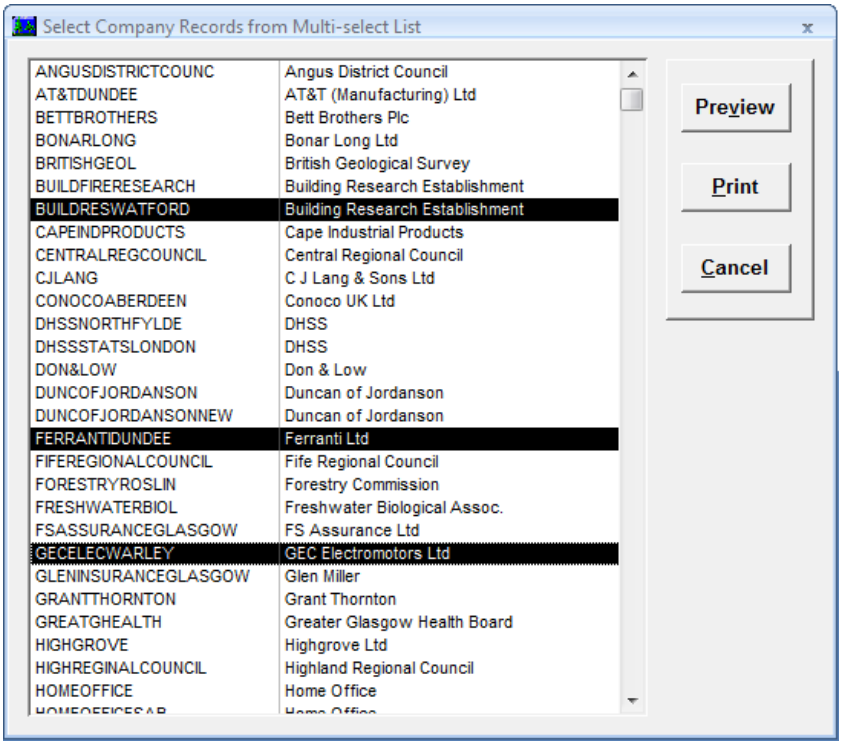
Use the "Report List" button on the Main Menu, illustrated in Section 3 of this manual, to display the Select Report Dialog, shown below.


Choose Required Report
Company
Student
Applications & Interviews
Placements
Jobs
H&S
Favourites
Company : List of Companies + Company Codes No
Company : List of Companies + Custom 1&2 fields No
Company : List of Companies + Custom 3&4 fields No
Company : List of Companies + Custom 5&6 fields No
Company : List of Companies + Custom6 field No
Company : List of Companies + Optionc1 field No
Company : List of Companies + Optionc2 field No
Company : List of Companies + Optionc3 field No
Company : List of Companies + Optionc4 field No
Company : List of Companies + Optionc5 field No
Company : List of Companies + Option 1&2 fields No
Company : List of Companies + Email & Website No
Company : Contact, Tel, Address (16 per page) No
Company : All Details No
Company : Address etc. (2 per page) No
Company : Status : Action Required Details Yes
Company : Correspondence Log No
Company : Further Information (Memo Region) No
Company : Notice No
Company : Notice + Contact No
Company : Tasks No
Company : Tasks (compact) Yes
OK
Cancel

Click on the required report tab (Company in the above illustration) and use your mouse or cursors to highlight the required report and then click on OK to select the report and display the "Choose Individual or Option Codes" dialog box shown on the next page. {With the keyboard press [TAB] to cycle between the list, OK & Cancel buttons.}



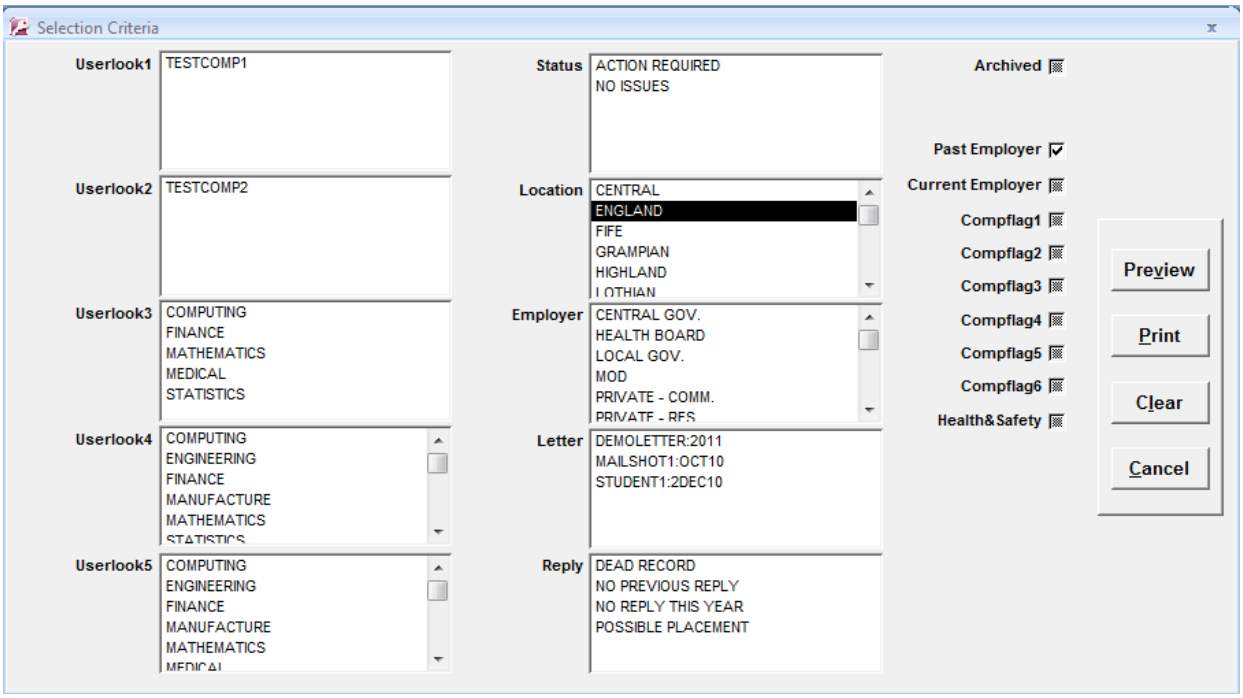
If you require to Select individual records at random, check the top radio button, shown above, then click on OK to display the "Select Company Records" screen, shown below. The 32 bit version uses the Access Multi-select List box. Pressing a letter will take you directly to the first company code starting with that letter {only the first letter may be used in this dialog box}. Alternatively use your mouse or cursors to navigate the list. Select codes by clicking with your mouse - hold down the Ctrl key to make multiple selections. {With the keyboard press [TAB] to cycle between the list and available buttons.} When you have completed your selections click on the "Preview" button to display the report on screen as shown in Section 8.1.2. Alternatively you may click the "Print" button to print directly to the default Windows Printer.



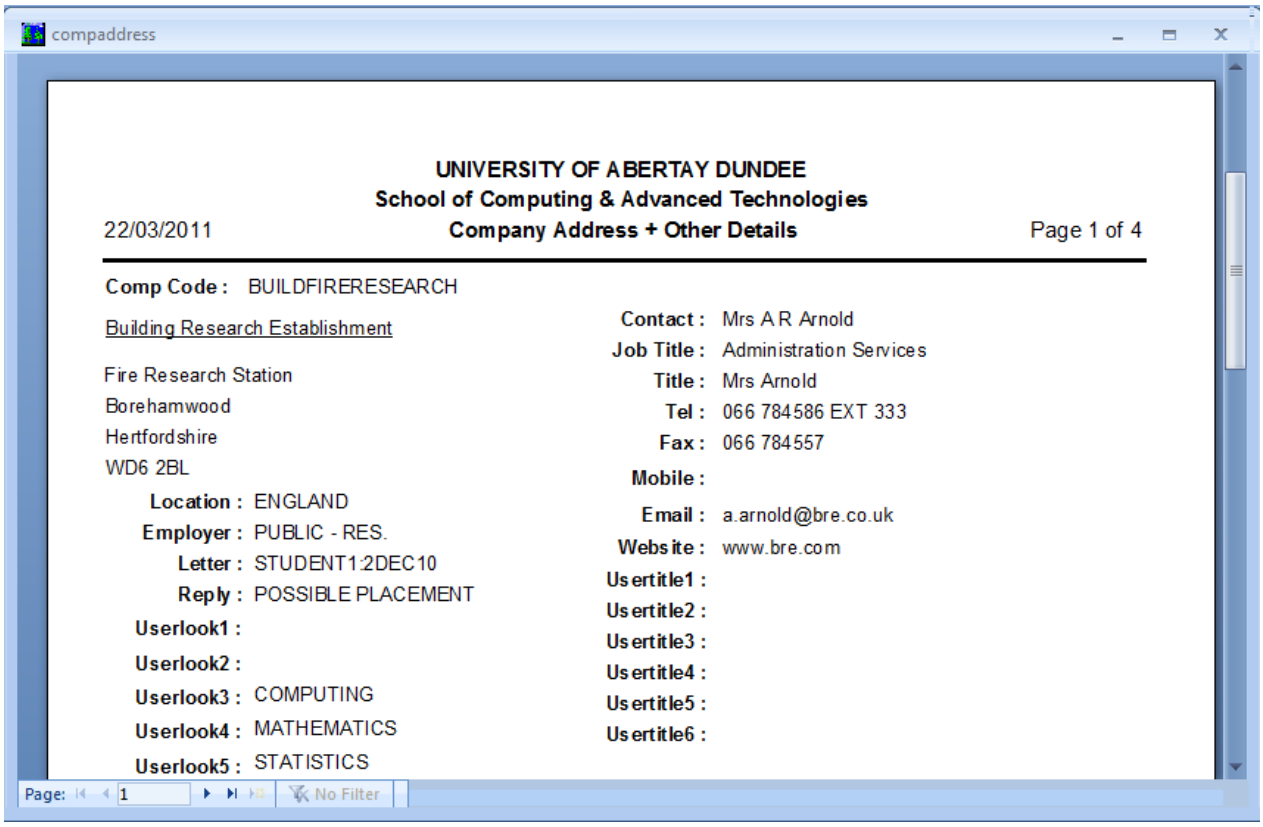
When the Available list is active pressing a letter will take you directly to the first code starting with that letter {only the first letter may be used in this dialog box}. Alternatively use your mouse or cursors to navigate the list. Select codes by double-clicking the code or clicking on the top arrow between the two list boxes. {With the keyboard press [TAB] to cycle between the lists and available buttons.} You may select as many records as required which are displayed in the "Selected" list. When you have completed your selections click on the "Preview" button to display the report on screen as shown on the next page. Alternatively you may click the "Print" button to print directly to the default Windows Printer.

In addition to the selection of records at random explained above, you may select records based on appropriate Look-up codes. To do this you require to use Selection codes, check the lower radio button in the "Choose Individual or Option Codes" Dialog box and click on OK to display the "Selection Criteria" screen shown on the next page. Make no selections to include all records, or narrow your choice by clicking on required codes. Yes/No toggle fields such as the one for past employer have three settings and give great flexibility. Initially when shaded grey all

records would be included. When checked (with a tick or cross) only Yes responses are selected and if coloured white only No responses are selected. Clicking on a toggle box cycles through the three options. Finally, click the “Preview” button to display the report on screen as shown on the next page. Use the “Clear” button to reset all selections.



Typical Report in Screen Preview Mode



8.1.3 List of PineSoft Report Options

Reports are designed to give as much flexibility as possible and it is not likely that you will regularly use more than a few of the available options. The Preview Report facility will enable you to examine reports on screen before deciding whether or not to print them. Over time further report options are added so check the applications Report Select list for the latest details.

At the launch of PineSoft Version 12.6f in 2012 the number of report options had increased to over ninety.

Company	:	List of Companies + Company Codes
		List of Companies + Key field 1
		List of Companies + Key fields 1 & 2
		List of Companies + User definable custom6 field
		All details, including current applications & placement details
		Address + other details {2 records per page}
		Status : Action Required Details
		Further Information {Memo field}
		Notice of company address + company details for Placement Notice board
		Notice - as above plus contact details
		Interview details with dates etc. for display on Placement Notice board
		Tasks (Consultancies, Short Courses etc.)
Student	:	Class List + Personal Tutor
		Class List + Student ID
		Class List + Custom field 1
		Class List + Custom fields 1 - 2
		Class List + Custom fields 1 - 4
		Class List + Key fields 1 - 2
		Class List + Option field 1
		Class List + Option field 2
		Class List + Option fields 1 - 2
		Placements Required / Placed
		All details, including current applications & placement details
		Address + other details {1 record per page}
		Job Preferences
		Status : Action Required Details
		Further Information {Memo field}
		Reference {Use headed paper}
		Reference + photograph of student {Use headed paper}
		Photographs (16 per page)
		Tasks (Projects etc.)
Proforma	:	1 : Student
		2 : Student + Personal Tutor

3 : Student + Visiting Tutor
4 : Student + Custom 1 field
5 : Student + Options1 field
6 : Student + Options2 field
7 : Student + Options3 field

Applications :
Ordered by company (new page for each placement cohort)
Ordered by company (compact - continuous output)
Ordered by student (new page for each placement cohort)
Ordered by student (compact - continuous output)
Student Summary Totals
Interview Details

Placements :
Summary with Student ID (All courses)
Summary list of placements (new page for each placement cohort)
Summary list of placements (compact - continuous output)
Summary list - latest placement details
Summary list of placements : Ordered by Location (new page each cohort)
Summary list of placements : ordered by Location (compact output)
Tasks : Ordered by student {Landscape format}
Tasks : Ordered by company {Landscape format}
Tasks : Ordered by Visiting Tutor {Landscape format}
Full Details : One per page } Includes Comment text
Full Details : One per page + picture } issue to Visiting Tutors
Main Details : Ordered by Student }
Main Details: Ordered by Student + picture } 3 records
Main Details: Ordered by Location } per page
Main Details: Ordered by Visiting Tutor }
Status : Progress (Action) Details
Breakdown : Duration of placements + salaries
Breakdown : Location
Breakdown : Employer type
Breakdown : Employer List + number of students placed
Tasks (Visits, return of reports etc.)

Jobs :
Summary (one company per page)
Full Job Details
Compact Job Details
Status : Action Required Details

H&S :
Company Summary (Lists whether certified with date)
Student Summary (Lists all H&S requirements for students)

8.2 Mail List

8.2.1 Overview of Mail Options

Over twenty mail output options are provided to enable you to select Letters or Memos created in the PineSoft application. Output for each mail option may be previewed on screen, then output to a printer or a file on disk.

Via the use of "bullet-proof" dialog box choices you may choose particular subgroups of records using company codes, student name, course, session, year, tutor etc. The actual dialog box options will match each particular report group. The selection procedures are identical to those for Report Output discussed in the previous section. To enable you to locate specific output options more easily they have been grouped into the four classes : Letter, Label, Envelope and Memo. Details of each group of reports is given in Section 8.2.7, however, **new reports are added from time to time - see the application for latest options.**

8.2.2 Output Letters

The PineSoft application gives you great flexibility and ease of use when Mail Merging letters. You may select to output any letter created via the Examine/Edit Letters option described in Section 7.4 Each letter may be merged to the Main Company Contact, The Company Supervisor, Student at Home/Term address or c/o the main company contact or supervisor. Name, status and address of recipients are automatically merged into each letter with the use of the format Dear [Title field] giving you control over format - i.e. Dear Bob, or Dear Dr Smith as required. The line-squeeze facility ensures that no gaps are left if the status field, or any address fields happen to be blank.

In addition you may send a **"Thankyou format"** letter to the main company contact or supervisor, with the student's name automatically inserted at the top of the letter.

After printing or previewing a letter you are given the option to update the "letter code field" and "Further Details Memo Region field" in the appropriate company or student database record, to give a complete log of all letters sent.

The layout of a typical letter is shown in the appendices and has been designed to enable the use of standard DL window envelopes if required.

As indicated in Section 7.4 you will need to experiment with the use of the three fields Ref1, Ref2, Date which print above the address and the three fields Header1, Header2, Header3 which print on the right hand side below the address to suit your Headed Paper. For example, use Header1, 2 or 3 for the date if you like to see it on the right hand side. You may reposition the whole letter by using the Printer Setup options to change margin settings. For example, change the top margin setting from 1.6" to 2.0" to move everything down 0.4". With this flexibility you should be able to decide on a suitable format. After changing any options you are given the opportunity to save them as your new defaults for that particular letter/report when you close the preview/print window.

Note : when Examining/Editing Letters in datasheet view it is possible to resize and reposition the position of columns. So if you are only using header2, you may mark and drag it with your mouse so that it is displayed next to the letter code field. On closing the window you are given the option of saving your settings as new defaults.

8.2.3 Output Labels

You may select individual or groups of records and produce 16 labels per page of Standard Avery L16 Laser Labels {4" x 1&1/3" 2 column's of 8 labels per A4 sheet}. Tip : Create "blank" company records with codes ABLANK1, ABLANK2 ---- ABLANK7 to make it easy to reuse partially used label sheets starting at any label position!

8.2.4 Output Envelopes

You may select individual or groups of records and print names & addresses directly on Envelopes. The reports have initial default settings for DL size envelopes. **Please check via the Windows Printer Setup option while previewing "envelope reports" on screen that your printer is set for Landscape orientation and DL envelope paper size.** You may save any changes, on exit from the report, as new defaults for that report.

For a large mailshot I would recommend the use of labels or DL window envelopes, however, the envelope feature is very useful when you have only a few letters.

8.2.5 Output Memos

You may select a single memo and output it either with no header or a Memo header which will automatically incorporate your Institution & Department name. Again you may modify margins in the Printer Setup options to adjust the position of printed memos.

8.2.6 Export Options & Customised Letters/Reports

The default PineSoft letter output options discussed in Section 8.2.2 are easy to use and will produce high quality proportional output using an Arial font, the same as the main body text in this User Manual.

The Export options are designed for those users who require greater control over fonts, attributes {bold, italic etc}, point size, the ability to insert PineSoft database fields at any point of a letter etc.

You may select individual or groups of records as usual and then export the PineSoft data to a file name of your choice in Microsoft Text or Excel Mail Merge format. You then require to exit the PineSoft application, and load Microsoft Word for Windows {or other Word Processor} where you may create customised letters, labels & envelopes with a large number of built in options to help you in MS Word etc. See the on-line help or the Mail Merge Chapter in the Word documentation for information on how to produce very "flexible" output. For example, you could use the envelope merge format to produce a list of company contact names, addresses and telephone number using two or three column displays.

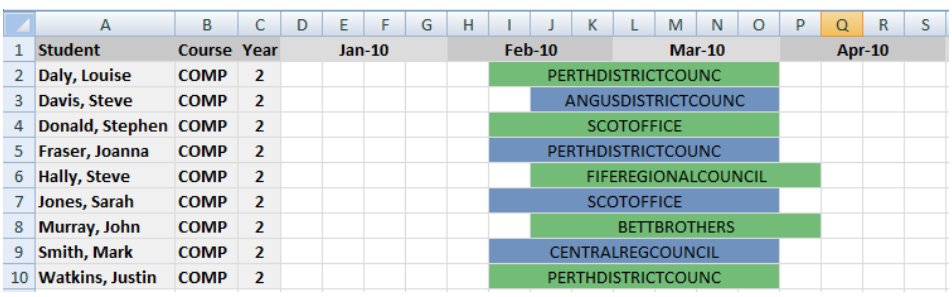
In fact you may easily produce "Customised Reports" using any PineSoft database fields to give **total flexibility**. At the University of Abertay Placement details were previously recorded laboriously using a number of Standard Pro-forma. However, these forms were easily duplicated in a Word for Windows document with data automatically merged via the PineSoft Export option - see the last report in the appendix for typical output.

Note : Once you have created a Microsoft Mail Merge document you may save it for future use. Then you only have to update the exported mail merge file {keeping the same file name} to easily output your updated results. It is not too difficult, once you get some practice, however, you may decide to stick to the default PineSoft options which are easier to use - the choice is yours.

New Export additions added in Version 12.6

(1) Send emails to selected groups of recipients, and record details in Correspondence Log.

(2) A Timeline option which gives a graphical view of placements by exporting and formatting output to Microsoft Excel, as shown below.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Student	Course	Year	Jan-10					Feb-10				Mar-10				Apr-10		
2	Daly, Louise	COMP	2						PERTHDISTRICTCOUNC										
3	Davis, Steve	COMP	2							ANGUSDISTRICTCOUNC									
4	Donald, Stephen	COMP	2						SCOTOFFICE										
5	Fraser, Joanna	COMP	2						PERTHDISTRICTCOUNC										
6	Hally, Steve	COMP	2							FIFEREGIONALCOUNCIL									
7	Jones, Sarah	COMP	2						SCOTOFFICE										
8	Murray, John	COMP	2							BETTBROTHERS									
9	Smith, Mark	COMP	2						CENTRALREGCOUNCIL										
10	Watkins, Justin	COMP	2						PERTHDISTRICTCOUNC										

8.2.7 PineSoft Mail List Options

The Mail list options are designed to make it very easy to output your mail to all possible recipients. The Preview Report facility will enable you to examine mail output on screen before deciding whether or not to print. See the application for additional “latest placement” options.

Letter :	Company Contact
	Company Contact : Thankyou
	Supervisor
	Supervisor : Thankyou
	Student : Home address
	Student : Term address
	Student : c/o Company Contact
	Student : c/o Supervisor
	Student : Placement address
Label :	Company Contact
	Company Contact : Thankyou
	Supervisor
	Student : Home address
	Student : Term address
	Student : c/o Company Contact
	Student : c/o Supervisor
	Student : Placement address
Envelope :	Company Contact
	Company Contact : Thankyou
	Supervisor
	Student : Home address
	Student : Term address
	Student : c/o Company Contact
	Student : c/o Supervisor
	Student : Placement address
Memo :	No Header
	With Header

8.2.8 PineSoft Export List Options

Export : Company data for Microsoft Mail Merge or Group Email

Export : Student data for Microsoft Mail Merge or Group Email

Export : Placement data for Microsoft Mail Merge or Group Email

Export : Create Excel Timeline Chart

9 : Miscellaneous

9.1 Notation

You need to be consistent in your interpretation of the session year 2013, 2014, ... and its relation to a particular session 2012/2013, 2013/2014, ...

In the demonstration version with placement periods from March to September, session 2013, for example, would refer to the March - September 2013 placement, though the academic session would be 2012/2013 and the students entered that particular year of the course in 2012.

For consistency stick to this notation.

9.2 Importing Data

While it is very easy to export data from the PineSoft application using the Export buttons described in Section 4.4, importing data is not so straightforward as field names must match those used by PineSoft and care needs to be taken not to conflict with the Referential Integrity rules built into the application.

To import data you will need to ensure that you use the correct PineSoft field names in the first row.

The easiest method is to use “Cut & Paste Import”. Please view the latest Videos and pdf tutorials in the Learning Centre of our website at : www.pinesoft.findonit.com/learning.php for full details.

9.3 Assigning or Changing the Password

The application is supplied without a password. You may define a password, if required, but will always log on to the application with user name : Admin. Don’t forget it will then be your responsibility to remember the new password as you will be unable to load the application without it.

If you definitely want to assign or change a password, after loading the PineSoft application with the Main Menu displayed choose password from the tools menu bar option & complete the entries in the following Change PineSoft Password dialog box.

Change PineSoft Password
User Name:
Admin
Old Password:
New Password:
Verify:
OK
Cancel
IMPORTANT : If you change the default password it will be your responsibility to remember the new one, as without it you will be unable to access the PineSoft application!

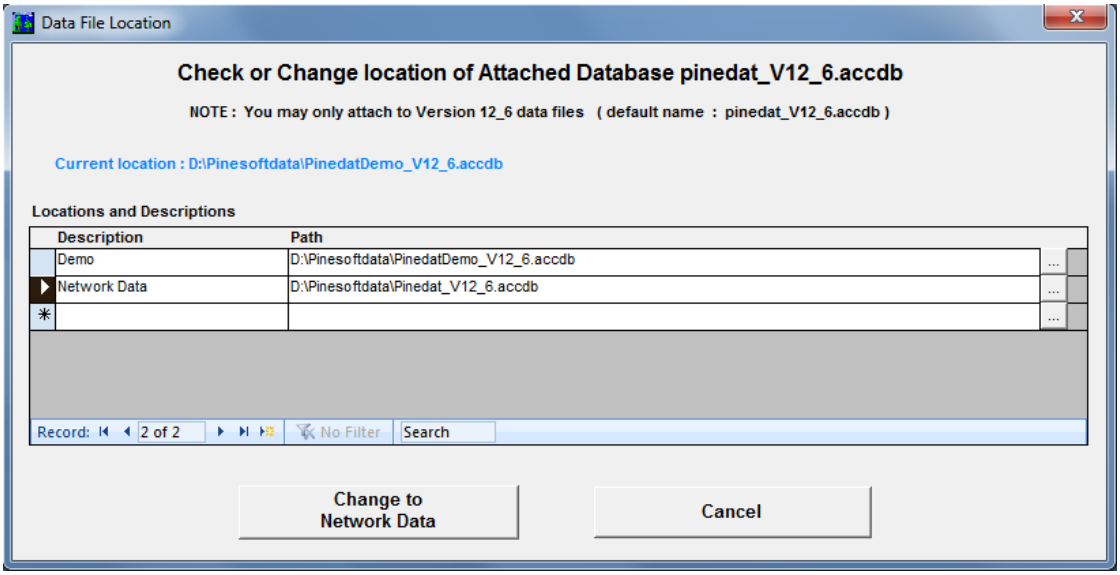
9.4 Changing the Attached Data File

After loading the PineSoft application with the Main Menu displayed the “Attachments - Check / Change Location” option from the Add-Ins > tools menu bar, displays the dialog box shown below. The Current Location of the PineSoft data file is shown, highlighted in blue - in this case:

D:\Pinesoftdata\PinedatDemo_V12_6.accdb.

You may define paths to other locations, such as, a Network drive P: and give a description for the location. With the “Network Data” row, selected below, clicking on the button indicating “Change to Network Data” would create an attachment to the data file D:\Pinesoftdata\Pinedat_V12_6.accdb

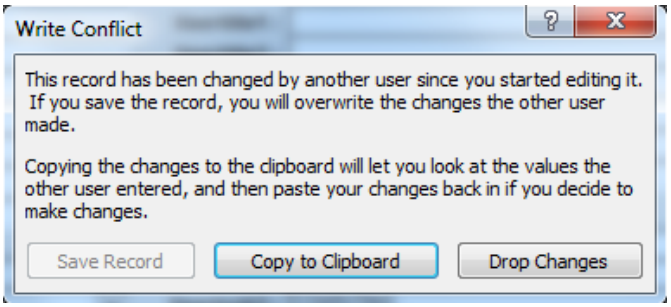
NOTE : PineSoft Version 12.6 will only attach to Version 12.6 (Access 2007/2010) data files : (E.g. Pinedat_V12_6.accdb)



9.5 Record Locking and Write Conflicts

The application uses record level (optimistic) locking, so a write conflict should only occur if two users are attempting to update the same record in the same database table.

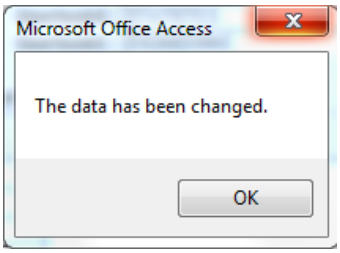
When a record is being updated by two users simultaneously, the first user to move away from the record (prompting the auto save) will have their changes saved, however, when the second user moves away they will see the following Write Conflict dialog box :


Write Conflict
This record has been changed by another user since you started editing it. If you save the record, you will overwrite the changes the other user made.
Copying the changes to the clipboard will let you look at the values the other user entered, and then paste your changes back in if you decide to make changes.
Save Record
Copy to Clipboard
Drop Changes

As the record has already been changed by the first user, the second user should **always drop their changes** - they will then see the updated record and can continue to enter their updates.

NOTE : The "Copy to Clipboard" option is not very helpful, so is best ignored.

If two users are in the same database table, but not the same record, and if one user updates a particular record, then if the second user happens to enter that record they will see the following dialog box :



- no action is required - data will have been saved correctly.

9.6 Technical Support

Technical support is always available. Existing customers will be kept fully informed of any enhancements - remember I not only market the software but used it daily as a Placement Manager at the University of Abertay Dundee for many years, so I am particularly keen to make it as flexible and labour saving as possible. If you have any suggestions for future developments please let me know.

Contact : Dr Stuart Donald, The Pines, Brucefield Road, Rosemount, Blairgowrie, PH10 6LA

Tel : 01250 873744

Email : pinesoft@findonit.com or helpdesk@pinesoft.net

Website : www.pinesoft.findonit.com

NOTE

The PineSoft Website has a useful Learning Centre at www.pinesoft.findonit.com/learning.php which contains Training Videos which take you through common tasks.

Please use “On-line Requests” pages to provide feedback and log any requests for possible future enhancements.

10 : Appendices

10.1 Typical Printer Output

The appendices contain a number of examples of typical printer output. This small sample of the available mail and report options show the quality of output you may produce in seconds.

- Company Standard Letter : DEMOLETTER
- Memo : Illustrative Memo Header
- Report - Company : All
- Report – Company : Student Job Placements
- Report - Company : Jobs : Full Details
- Report - Applications : Ordered by student (Compact)
- Report - Applications : Interviews (All courses)
- Report - Placements : Summary : Ordered by location (Compact)
- Report - Placements : Summary (All courses) {Landscape format}
- Report - Placements : Full Listing (One per page with picture}
- Report - Placements : Breakdown : Location
- Health & Safety Student Summary {Landscape format}
- Customised Word for Windows Report with data automatically merged

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